



CCMI Stock Donation Instructions

Thank you for supporting CCMI via the donation of stock. We have a simple three step process that aligns with CCMI's audit requirements.

Step 1 - Provide the intended donation details to CCMI

Please fill in (or ask your broker to fill in) the following information and send to the CCMI team, via accounts@reefresearch.org, please CC kholden@reefresearch.org.

Donor Name: _____
Broker Name with DTC #: _____
Account Number at Broker: _____
Stock Name/Symbol: _____
Amount of Shares: _____

Please also provide the following contact information for the person handling the transfer:

Name (if different from donor name): _____
Email: _____
Phone: _____
Signature (electronic): _____

Step 2 - Donation registration

CCMI will initiate a transfer instruction with Interactive brokers to facilitate the transfer. Once the instruction has been set up, we will send you our broker details and account number for you, or your broker, to initiate the stock transfer.

Step 3 - The transfer can be completed

CCMI will provide a tax letter/receipt of funds for your records.