



Greater San Diego Muslim Community Center
14698 Via Fiesta, San Diego, CA 92127
Email: treasurer@mccsandiego.org
Phone: (858) 201-9840
Web: www.MCCsandiego.org

MCC Stock Donation Procedure

Option 1 (Online):

E*TRADE to Greater San Diego Muslim Community Center

URL: <https://us.etrade.com/e/t/plan/charitable donations>

Account Name / Charity Name: Greater San Diego Muslim Community Center

Account Number: Z40299529

Fidelity DCC Number for third party trader transfers: 0226

For detailed step by step instructions, refer to pages 2-7 below

Option 2 (Phone): Calling E*TRADE

Call: +1 (800) -387-2331

Account Name / Charity Name: Greater San Diego Muslim Community Center

Receiving Firm Name: Fidelity Brokerage Services Inc.

Account Number: Z40299529

<p>For Information and queries on Stock donation please contact</p> <p>Mohamed Muzaffer E: treasurer@mccsandiego.org P: 858-201-9840</p>	<p>For Tax Receipts Please contact</p> <p>E: center_admin@mccsandiego.org P: 858-756-5100</p>
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Detailed Step by Step Instruction (E-Trade)

Step 1

Go to
Transfers -> Other Services ->
Make a charitable donation

The screenshot displays the E*TRADE website interface. At the top, there is a market data bar showing DOW at 28,894.50 (+307.69, 1.08%), NASDAQ at 11,894.32 (+314.37, 2.71%), and S&P500 at 3,539.02 (+61.89, 1.78%) as of 12:54PM ET. Below this is the E*TRADE logo and a navigation menu with options: Accounts, Trading, Markets & Ideas, Stock Plan, and What We Offer. A secondary menu includes Complete View, Portfolios, Watch Lists, Orders, Balances, Transactions, Banking, Transfers (highlighted), Tax Center, Documents, and Dividend Reinvestment. The main content area is titled 'Transfers' and has sub-tabs for Transfer, Activity, External accounts, and Other services (selected). A grid of 11 service tiles is shown, with 'Make a charitable donation' highlighted in a light blue border. The other tiles include: Request an IRA distribution, Pay a bill, Deposit checks, Request a check, Order a check book, Request a debit card, Request a stop payment, Set up a direct deposit, Set up Automatic Investing, and Transfer investments within E*TRADE.

Step 2

Click **Donate**

The screenshot shows the E*TRADE website's donation page. At the top, there is a navigation bar with the E*TRADE logo and links for Accounts, Trading, Markets & Ideas, Stock Plan, and What We Offer. A search bar is on the right. Below the navigation bar, there is a market data ticker showing DOW, NASDAQ, and S&P500 indices. A blue banner contains an important notice about donation deadlines for 2019. The main heading is 'Do well by doing good', followed by a sub-heading: 'Donating shares to charity can help make the world a better place, and you may qualify for tax deductions along the way.' A prominent blue 'Donate' button is centered, with a link 'Donate from a retirement account' below it. The section 'Why donate shares?' features three columns: 'Qualify for a tax deduction', 'Avoid capital gains taxes', and 'Maximize your donation'. The 'How to donate' section follows, with the text 'Donating online is quick and easy.' and a three-step process: 1. Select the account from which you want to donate shares; 2. Choose a charity with a mission you're passionate about; 3. Select which shares you'd like to donate. We'll handle the rest! A 'Get started' button is centered below the steps, with a link 'Use paper form instead' underneath.

DOW 28,892.21 + 305.31 (1.07%) NASDAQ 11,892.51 + 512.57 (2.70%) S&P500 3,538.72 + 61.69 (1.77%) as of 12:55PM ET 17 Customer

E*TRADE Accounts Trading Markets & Ideas Stock Plan What We Offer Symbol, company, or key

Refresh October 12, 2020 12:55 PM

Important donation deadlines
To ensure your mutual fund or options charitable donation is processed in 2019, complete your request before December 13.
To ensure your stock or bond charitable donation is processed in 2019, complete your request before December 20.
For any requests received after the listed deadlines, we will make our best effort to process them in the 2019 tax year.

Do well by doing good

Donating shares to charity can help make the world a better place, and you may qualify for tax deductions along the way.

Donate

[Donate from a retirement account](#)

Why donate shares?

Qualify for a tax deduction
Charitable donations may be tax deductible if you meet certain requirements. [Learn more](#)

Avoid capital gains taxes
You're not required to pay capital gains taxes on donated shares.

Maximize your donation
Because you don't pay capital gains taxes, donating shares can help your money go further.

How to donate

Donating online is quick and easy.

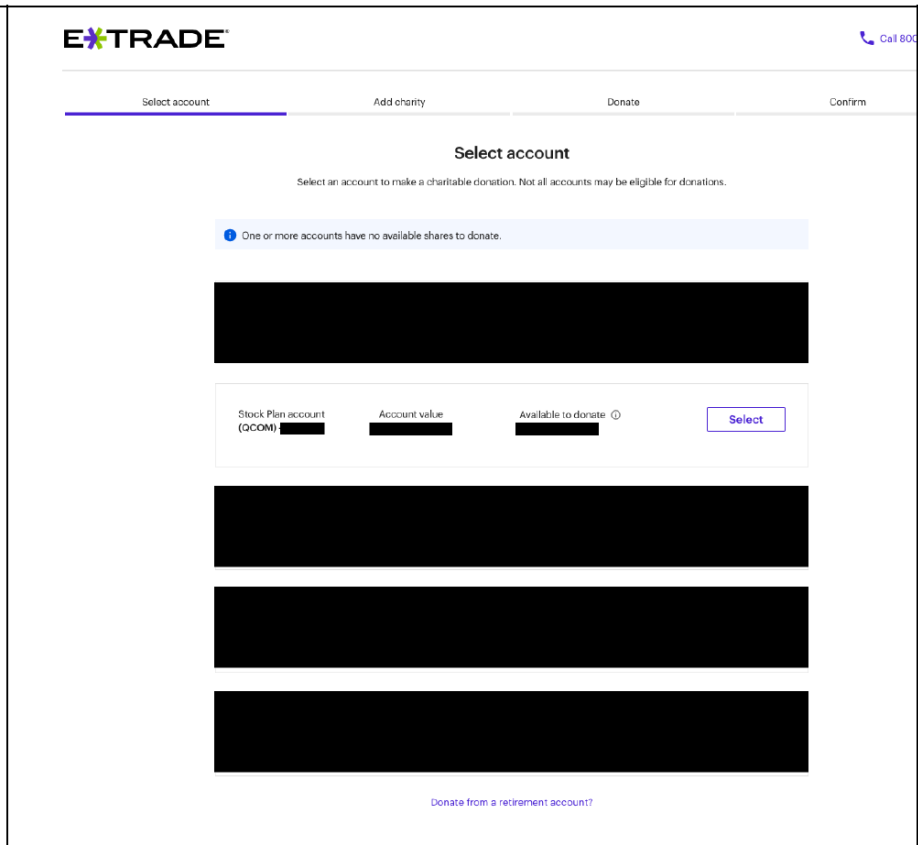
- 1**
Select the account from which you want to donate shares
- 2**
Choose a charity with a mission you're passionate about
- 3**
Select which shares you'd like to donate. We'll handle the rest!

Get started

[Use paper form instead](#)

Step 3

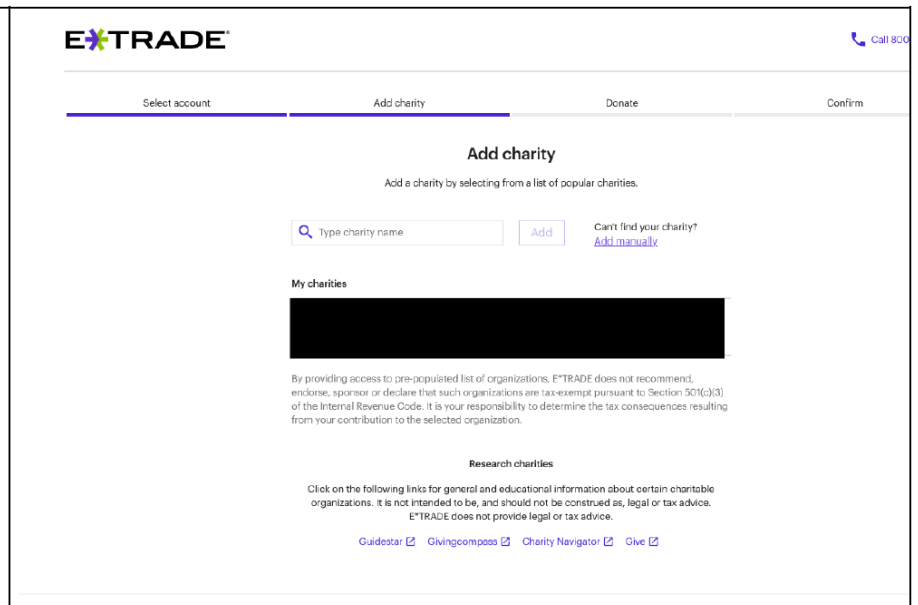
Select a account to donate stock



The screenshot shows the E*TRADE 'Select account' page. At the top, the E*TRADE logo is on the left and 'Call 800' is on the right. Below the logo is a progress bar with four steps: 'Select account' (highlighted), 'Add charity', 'Donate', and 'Confirm'. The main heading is 'Select account' with a sub-heading: 'Select an account to make a charitable donation. Not all accounts may be eligible for donations.' A blue message box states: 'One or more accounts have no available shares to donate.' Below this is a table with columns: 'Stock Plan account (DCOM)', 'Account value', and 'Available to donate'. A 'Select' button is to the right of the table. The table content is redacted with black boxes. At the bottom, there is a link: 'Donate from a retirement account?'.

Step 4

Click on "Add manually"



The screenshot shows the E*TRADE 'Add charity' page. At the top, the E*TRADE logo is on the left and 'Call 800' is on the right. Below the logo is a progress bar with four steps: 'Select account', 'Add charity' (highlighted), 'Donate', and 'Confirm'. The main heading is 'Add charity' with a sub-heading: 'Add a charity by selecting from a list of popular charities.' There is a search box labeled 'Type charity name' with an 'Add' button to its right. To the right of the search box is a link: 'Can't find your charity? Add manually'. Below the search box is a section titled 'My charities' with a redacted area. A disclaimer follows: 'By providing access to pre-populated list of organizations, E*TRADE does not recommend, endorse, sponsor or declare that such organizations are tax-exempt pursuant to Section 501(c)(3) of the Internal Revenue Code. It is your responsibility to determine the tax consequences resulting from your contribution to the selected organization.' Below the disclaimer is a section titled 'Research charities' with the text: 'Click on the following links for general and educational information about certain charitable organizations. It is not intended to be, and should not be construed as, legal or tax advice. E*TRADE does not provide legal or tax advice.' At the bottom are four links: 'Guidestar', 'Givingcompass', 'Charity Navigator', and 'Give'.

Step 5

Step 2 of 5: Add charity

Add charity manually

Enter your charity and receiving firm, and we'll handle the rest. If you can't find your receiving firm, you can use our [Charitable Donation Form](#).

Charity name

Greater San Diego Muslim Community Center

Receiving firm name

FIDELITY BROKERAGE SERVICES INC.

Receiving account number

Z40299529

Receiving firm DTC number

0226

Save

Cancel

Step 6

Click Donate
Next to the
Charity Name

Step 2 of 5: Add charity

Add charity

Add a charity by selecting from a list of popular charities.

Type charity name

Add

Can't find your charity?
[Add manually](#)

My charities



Greater San Diego Muslim Community Center
(Account #: Z40299529)



Donate

By providing access to pre-populated list of organizations, E*TRADE does not recommend, endorse, sponsor or declare that such organizations are tax-exempt pursuant to Section 501(c)(3) of the Internal Revenue Code. It is your responsibility to determine the tax consequences resulting from your contribution to the selected organization.

Step 7

Select the stocks and quantities that you would like to transfer. Then click **Review** at the bottom of the page.

The screenshot shows the E*TRADE interface for a Stock Plan QCOM. At the top, there are navigation tabs: "Select account", "Add charity", "Donate", and "Confirm". Below these, the account name "Stock Plan QCOM" is displayed. Key statistics include "Last QCOM Price \$127.05", "Today's Change \$2.18 (1.75%)", and "Volume 4,388". A table titled "Transferable shares" is shown with columns for "Date acquired", "Benefit type", "Transferable qty", "# of shares to donate", "Est. donation", "Est. cost basis", and "Est. market value". One row is visible with "11/09/2015", "Restricted Stock", "1", "\$127.05", and "\$127.05". At the bottom, a summary bar shows "Total shares to transfer: 1" and "Est. donation: \$127.05". A blue "Review" button is circled in red.

Step 8

Review your donation and click **Confirm**

The screenshot shows the "Review your donation" screen in E*TRADE. The page title is "Review your donation" and it is labeled "Step 4 of 5: Review". The donation is from "From: (QCOM) - 2844". A table summarizes the donation:

Type	Symbol	# of shares	Est. cost basis	Est. donation
Restricted Stock	QCOM	50	\$85.62	\$9,310.00
Total donation		50		\$9,310.00

Below the table, there is a disclaimer: "You may be able to deduct your charitable donation from your taxable income. However, the amount you can deduct (if any) depends on the recipient organization's status as a tax-exempt organization, your income during the donation year, the state you live in, whether you itemize deductions, and how long you've owned the shares you're donating. Make sure you speak to an attorney or tax professional about your specific situation." Another note states: "Donated shares are transferred in-kind and the final value of a donation will depend, among other things, on the time it takes the charity's broker-dealer to process a deposit." At the bottom, there is a "Confirm" button.

Step 9

1. Save Your confirmation
2. Notify MCC to track and look out for your donation

Contact Info:

treasurer@mccsandiego.org

Ph: (858)-201-9840

E*TRADE

Call 800-387-2331

Step 5 of 5: Confirmation

✔ Thank you!

We've received your donation request. Please print this page to keep for your reference.

From: (QCOM) 2844

Type	Symbol	# of shares	Est. cost basis	Est. donation
Restricted Stock	QCOM	50	\$85.62	\$9,310.00
Total donation		50		\$9,310.00

You may be able to deduct your charitable donation from your taxable income. However, the amount you can deduct (if any) depends on the recipient organization's status as a tax-exempt organization, your income during the donation year, the state you live in, whether you itemize deductions, and how long you've owned the shares you're donating. Make sure you speak to an attorney or tax professional about your specific situation.

Donated shares are transferred in-kind and the final value of a donation will depend, among other things, on the time it takes the charity's broker-dealer to process a deposit.

Please allow a few days for the receiving charity to process your donation. You can check the status of the request (Reference number: 22126740738881), or go back to Stock Plan account.

[Make another donation](#)