

STOCK GIFT PROCEDURES

Thank you for supporting Sunrise Community for Recovery and Wellness, Inc. through the gift of stock. For some donors gifts of stock may offer tax advantages. Please follow the procedure below to donate to our organization:

1. Your broker will need to know the following information about the Sunrise Community for Recovery and Wellness, Inc.
 - We have an account with LPL Financial under the management of Paragon Financial. They are located at 79 Woodfin Place Suite 201 Asheville NC 28801.
 - Our account number is 2486-0382
 - The DTC number is 0075
 - The tax ID number is 20-5775122
 - The contact person at Paragon Financial who is familiar with the account is Kelly Roark 828-232-0549 or toll free 866-698-0691.

2. When you decide to transfer stock to the us, please notify us at 828-552-3858 or sunriserecoverybooks@gmail.com. This way we will know to be on the lookout for the shares and we will be able to match the stock with the donor.
Please tell us
 - Your name and address
 - The name of stock you will be donating and the approximate number of shares

3. Once the stock has arrived in our account, a sell order will be placed. It is the policy of the Sunrise Community for Recovery and Wellness Inc. not to speculate in the securities market but to sell stock gifts as soon as possible.

4. We will send you an acknowledgement letter after the shares have been successfully transferred. If you don't hear anything, please notify the Treasurer so we can investigate.

5. Your gift will typically be the average amount of the high and low selling prices of your shares on the date of their transfer. Your broker will be able to give you that information. We will confirm by letter the transfer of the appropriate number of shares and the date. The amount we receive will be reflected on your giving statement. Please be aware this is not necessarily the same as the proper amount for deduction as just indicated. Please consult your broker and accountant for more on that point.

If you have further questions, please contact us at 828-552-3858
Thank you for your generosity to Sunrise Community for Recovery and Wellness, Inc..