

Oregon IDA Tax Credit Stock/Mutual Fund Contribution Instructions 2020



We must receive stocks and mutual fund contributions into our account by **December 31, 2020** and before the available tax credits are sold for the year. In some cases, transfers can take several weeks to complete, so we advise donors to plan accordingly.

- Step 1:** Complete our Oregon IDA Tax Credit Donor Form and mail or fax it (**do not email**) to Neighborhood Partnerships, which enables us to connect your contribution to you as the contributor.
- Step 2:** Transfer the securities from your account to the brokerage account for Neighborhood Partnerships (NP) at JP Morgan Chase. The NP Account information is:

DTC: 0352 JPMorgan Clearing Corp.
Neighborhood Partnerships
Account # 73539798
JPMorgan Clearing Corp.
4 Chase Metrotech Center
Mail Code NY1-C060
Brooklyn, NY 11245-0001

Please Note: Transfers to the Neighborhood Partnerships brokerage account are completed through the DTC system. Not all securities are eligible to be transferred via the DTC system. Consult your brokerage firm or holding company to confirm that transfers through the DTC system are available. You may also contact Kevin Benefiel at (971) 240-4124 or Vince Caporale at (503) 698-7348 at JP Morgan Securities.

If your securities are not eligible to be transferred through the DTC system, your donation will take additional time to process. Contact Monica Flechtner at Neighborhood Partnerships or Kevin Benefiel or Vince Caporale at JP Morgan Securities as soon as possible to see whether alternate arrangements can be made.

- Step 3:** We will monitor the NP brokerage account and sell the stocks or mutual funds as soon as possible after completion of the transfer. The sale price will establish the final contribution value and the value of Oregon tax credits purchased. A receipt will be sent to you within 1-2 weeks of the transfer. For a copy of our stock donation policy containing more detail on valuation of stocks, please contact Monica Flechtner.

The Neighborhood Partnerships federal tax ID # is 91-1943624.

Questions? Contact Monica Flechtner: (503) 226-3001 x102 or mflechtner@neighborhoodpartnerships.org

Revised 04.2018