Donating Stock

Thank you for considering a donation of stock to help support Columbia Insight. Here is information to help you with the process.

- Have your broker contact John Brunk, Vice President, Senior Financial Advisor with Umpqua Bank and Cetera (the financial firm handling the transaction). John’s contact information: 541.298.6646 or 541.340.9466, john.brunk@ceterais.com. His assistant Tonia, 541.298.6646 can also handle the transaction.
- Your broker will handle the transfer of your stock to Cetera. Advise your broker that the transaction is a donation to Columbia Insight. You will determine which stock and the number of shares.
- Please advise Columbia Insight Treasurer Jurgen Hess (hess@gorge.net) about the transaction with timing and details. He can also help answer questions.
- After your broker transfers the stock to Cetera, Columbia Insight will instruct Cetera to sell the stock. Cetera will transfer the actual cash donation from the sale of the stock to Columbia Insight’s checking account.
- The actual value of the stock donation is determined by the market conditions as of the date of the sale.
- Columbia Insight will send you a letter acknowledging the transaction for your records.
- Our tax ID is 82-4504894
- Our address is PO Box 1012, Hood River, OR 97031