Donating Stock

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

- Contact your broker and ask them to gift shares of your stock to Columbia Insight's Raymond James Account (DTC #0725), Columbia Insight Account # 130W6954.
- Please advise Columbia Insight Treasurer Jurgen Hess (hess@gorge.net) about the transaction with timing and details. He can also help answer questions.
- Have your broker contact John Brunk, Vice President, Senior Financial Advisor with Umpqua Bank (and Columbia Wealth Advisors). John's contact information is 541.298.6646 or 541.340.9466. His assistant Tonia Lompa, 541.298.6646 can also handle the transaction.
- Your broker will handle the transfer of your stock to Raymond James. Advise your broker that the transaction is a donation to Columbia Insight. You will determine which stock and the number of shares.
- After your broker transfers the stock, Columbia Insight will instruct Umpqua Bank (Columbia Wealth Advisors) to sell the stock. Raymond James 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 1021, Hood River, OR 97031

Effective January 4, 2024