



Individual Development Account Initiative

2010 State of Oregon  
Individual Development Account (IDA)  
Tax Credit Donor Form

Date: \_\_\_\_\_

Name of taxpayer (business or individual): \_\_\_\_\_

Mailing address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

If you have donated in previous years please check if this is a new address since 2009.

**CPA, Financial Advisor and/or Broker**

Name of Tax Advisor: \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Purchase Method:

**Check** Amount on check: \_\_\_\_\_  
Please make checks payable to **Neighborhood Partnerships**.

**Credit Card** Available online at <http://ida.neighborhoodpartnerships.org>

**Stock or Mutual Fund**

**NOTE:** Please follow DTC stock transfer instructions on page 2 of this form *Purchasing IDA Tax Credits with Stock*

Stock symbol: \_\_\_\_\_ # of Shares: \_\_\_\_\_

Mutual Fund symbol: \_\_\_\_\_ # of Shares: \_\_\_\_\_

Please mail this form and payment to:

**Neighborhood Partnerships**

ATTN: IDA Tax Credits  
1020 SW Taylor, Suite 680  
Portland, OR 97205  
Fax: 503-226-3027

Please add me to Neighborhood Partnerships' mailing list.



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### Instructions for Purchasing IDA Tax Credits with Stocks or Mutual Funds

**Step 1:** Please mail or fax the Tax Credit Donor Form, with your complete contact information and stock detail, to Neighborhood Partnerships.

**Neighborhood Partnerships**

ATTN: IDA Tax Credits  
1020 SW Taylor, Suite 680  
Portland OR 97205  
Fax: 503-226-3027

**Step 2:** Transfer the securities from your account to the brokerage account for Neighborhood Partnerships at Chase.

Neighborhood Partnerships' Account information is:

**DTC: 0226 National Financial Services  
The Neighborhood Partnerships  
Account # N15048135**

Wiring Instructions: ABA# 021000018; Bank of NYC/PA 632

If you have any questions about the transfer process, the contact at Chase is John Crabtree at 503-492-0449 or 800-392-5749

**Step 3:** When you initiate the transfer, notify Cynthia Winter at 503-226-3001 x 101 or 503-201-1292 or [cwinter@neighborhoodpartnerships.org](mailto:cwinter@neighborhoodpartnerships.org) so that we can monitor the NP account, sell the stock when they arrive and connect them back to the donor. The sale price will establish the final value and thus the number of tax credits purchased.

A receipt will be send to you within 5-7 business days of the transfer.

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

**Questions?** Please contact Cynthia Winter at 503-226-3001 x 101 or 503-201-1292 or [cwinter@neighborhoodpartnerships.org](mailto:cwinter@neighborhoodpartnerships.org)