



Stock Transfer Instructions

Thank you for your interest in making a charitable gift to Senior Center Inc, doing business as The Center, in the form of a Stock Transfer. **Please complete and return the second page of this form to receive your tax-acknowledgement letter from The Center.**

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to The Center. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to The Center, please note the following:

Brokerage House: Ameritrade

Account Name: Senior Center, Inc.

Account Number: 426995119

DTC Number: 0188

Reference:* Donor Name *(Including your name will ensure the gift is properly acknowledged.)*

Ameritrade phone number: 1-800-454-9272

*Please include donor name in the "Text Comment" of DTC Screen in order to identify donor associated with stock donation.



Gift of Stock Form

Please complete the information below to notify The Center of your gift and help ensure it is processed accurately. Please email the completed information to:

peter@thecentercville.org and kirstin@thecentercville.org.

Peter M. Thompson
Executive Director

Kirstin M. Fritz
Philanthropy Director

Donor & Securities Information:

Name & Type of Securities

Security Symbol

of Shares

____/____/____
Transfer Date

Donor Name (*Individual, Corporation, Foundation*)

Donor Address

Broker Name / Company / City / State

Broker Telephone Number / Email Address

Donor Telephone / Email Address (*to be used only if a question arises in the donation process*)

Donor Signature

____/____/____
Date Signed

Donor Signature

____/____/____
Date Signed

NOTE - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity. You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering The Center as the recipient of your charitable gift!