



## Donating Stock or Appreciated Securities

Transferring stock is an excellent way to support Chatham Education Foundation. A gift of securities may provide significant benefits, such as:

- A charitable income tax deduction for the fair market value of the gifted securities
- Elimination of capital gains tax that would ordinarily become due if you had sold the appreciated securities on the open market and donated the proceeds of the sale to the Chatham Education Foundation (if the securities are held for more than one year)

### How to Make a Stock Transfer

Inform your broker in writing that you wish to give appreciated securities to the Chatham Education Foundation. See sample letter below. Let us know that you have initiated a transfer of securities to the Chatham Education Foundation account by e-mailing [chathamedfoundation@gmail.com](mailto:chathamedfoundation@gmail.com). Provide your name so that we can provide you with the proper tax receipt as well as acknowledge your gift. The value of your gift will be calculated by using the mean value of each share on the date the shares arrive in our account. If you are concerned about the timing of your gift, please be sure to work closely with your broker or mutual fund company to ensure that the shares are transferred in a timely manner.

### Sample Letter with Stock Transfer Instructions for Your Broker

Name of Broker: \_\_\_\_\_

Address of Broker: \_\_\_\_\_

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

RE: Donors name and Account Number: \_\_\_\_\_

Please transfer the following securities to the Chatham Education Foundation.

Name of Security: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

**From** Account # \_\_\_\_\_

**To** Chatham Education Foundation, Vanguard Account Number: 23407599, DTC#0062  
Vanguard contact information: 800-662-2739, PO Box 2600, Valley Forge, PA 19482-2600

It is imperative that these shares be transferred, not sold, out of my/our account in order to complete a charitable gift to the Chatham Education Foundation.

Before transferring the stock, please e-mail [ChathamEdFoundation@gmail.com](mailto:ChathamEdFoundation@gmail.com)

Sincerely, \_\_\_\_\_