



How to Make a Gift of Stock to CEL

A charitable contribution of long-term appreciated securities – i.e. stocks, bonds and/or mutual funds that have realized significant appreciation over time – is one of the most tax-efficient of all ways to give.

The two key advantages:

- *Any long-term appreciated securities with unrealized gains (meaning they were purchased over a year ago, and have a current value greater than their original cost) may be donated to a public charity and a tax deduction taken for the full fair market value of the securities – up to 30% of the donor's adjusted gross income.*
- *Since the securities are donated rather than sold, capital gains taxes from selling the securities no longer apply. The more appreciation the securities have, the greater the tax saving will be. **

The information below is what you need to make a gift of stock to CEL.

1. Notify Adam McCormack, CEL's Director of Development or Harriet Levy, CEL's Executive Director of plans for a stock transfer.
2. Stock broker: RW Baird
3. RW Baird contact: Terri Geiss
4. DTC: 0547
5. Stock transfer account number: 70242522
6. CEL's letter of acknowledgment will reflect the value of the stock on the date the donor made it available to CEL. The value will be determined by the average of the high and low market value on the date the donor relinquishes control of the assets to CEL. There will be no deduction of the value to the donor for any broker fee.

Questions?

Call or email Adam McCormack Director of Development

Direct Line: 847-315-9919

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