SilverSource
A Leading Resource for Older Adults

Gifts of Stock or Securities

A simple, impactful way to support older adults in our community

Making a gift of stock or other securities is a powerful way to support SilverSource's mission while potentially providing meaningful tax advantages for you. Your generosity helps ensure that older adults in our community have access to nutritious food, benefits assistance, and essential support services.

Why consider a gift of stock?

Many donors find that gifts of stock are a tax-smart and efficient way to give. Donating appreciated stocks or securities may allow you to:

- Make a larger impact than with a cash gift alone
- Receive an income tax deduction for the fair market value of the securities
- Avoid paying capital gains tax on appreciated assets

Important information for donors

SilverSource does not determine the tax-deductible value of gifts of stock. After your transfer is complete, we will provide a written acknowledgment that includes the date of the stock transfer. Please consult your accountant or financial advisor to determine the value of your charitable contribution for IRS or other purposes.

What we need from you

Before or at the time of transfer, please let us know:

1. **What** is being transferred (name of the stock or security, number of shares, etc.)
2. **Where** the assets are being transferred from (financial institution or brokerage)

This information helps us promptly identify your gift and ensure accurate acknowledgment.

Stock transfer instructions

Step 1: Notify SilverSource

Please notify SilverSource of the name, type, and quantity of the securities you are donating, as well as the financial institution from which they will be transferred. To ensure your gift is received smoothly and acknowledged properly, please contact us in advance of your transfer.

Contact: Marianne Delaney, Chief Development Officer | mdelaney@silversource.org | (203) 557-8560

Step 2: Transfer the securities

Please ask your broker to transfer the securities using the information below:

- **Financial Institution: Vanguard**
- **SilverSource Account Number: 14532211**
- **DTC Number: 0062**
- **SilverSource EIN: 99-1895904**

Thank you

Your gift of stock makes a lasting difference in the lives of older adults served by SilverSource.
We are deeply grateful for your partnership and your commitment to our mission.

For the most current IRS charitable contribution regulations, please visit:
https://www.irs.gov/pub/irs-pdf/p526.pdf