

## Gifts of Stock or Securities

An attractive way of giving.

Stocks and securities can be transferred to SilverSource, Inc. Gifts of stock may provide a significant tax benefit: an income-tax deduction for both the property's fair-market value *and* for its appreciation. Donating the stock also allows you to avoid capital gains taxes.

*Please note: we do not determine the tax-deductible amount for donors contributing stock. We send you a gift acknowledgment that includes the date of the stock transfer. Please refer to your accountant or financial advisor to determine the value of your gift for IRS or other purposes.*

Please contact Marianne Delaney, Director of Development, if you plan to donate stock/transmit securities: [mdelaney@silversource.org](mailto:mdelaney@silversource.org) or (203) 324-6584

### Please let us know:

1. WHAT is being transferred (name, type and amount of stock shares, cash, etc.);
2. WHERE the assets are being transferred from;

### STOCK TRANSFER INSTRUCTIONS:

- a.) Please notify SilverSource of the **name, type, and quantity of the securities** you are donating, and where they will be coming from:

CONTACT: Marianne Delaney, Chief Development Officer, [mdelaney@silversource.org](mailto:mdelaney@silversource.org) / (203) 324-6584, ext. 302

- b.) Transfer the securities to our SilverSource Account:

**Name of Financial Institution:** Vanguard Institutional Advisory Services

**SilverSource Account No.:** 14532211

**DTC No.:** 0062

**Broker:** Dan Voss

- c.) Notify Vanguard:

Dan Voss

PO Box 2900, PN 20, Malvern, PA 19355

TEL.: (610) 669-2871

Email: [daniel\\_james\\_voss@vanguard.com](mailto:daniel_james_voss@vanguard.com)

For further information on gifts of stocks, please contact Marianne Delaney in our Development office.

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For a full list of the most current IRS year-end charity donation regulations, you may visit: <https://www.irs.gov/uac/Newsroom/Tips-from-IRS-for-Year-End-Gifts-to-Charity-1>