

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 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, Director of Development, 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: Michael T. Chance

- c.) **Notify Vanguard:**

Michael T. Chance

PO Box 2900, PN 20, Malvern, PA 19355

TEL.: (610) 669-2871

Email: Michael_T_Chance@vanguard.com

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

###

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>