

Stock Transfer



Thank you for your interest in making a charitable gift to ThanksUSA in the form of a Stock Transfer.

For stock held in brokerage accounts, your broker can assist you in making a gift via a direct transfer to ThanksUSA. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to ThanksUSA (Tax ID: 20-3973151), please note the following:

- **Brokerage House: UBS Financial Services, Inc.**
- **Account Name: ThanksUSA**
- **DTC Number: 0221**
- **Account Number: MV 08634**
- **Financial Advisor: ThanksUSA and UBS Team**
- **Telephone Number: 703-734-8411 or 703-734-8488**
- **Reference: Donor name (including your name will ensure the gift is properly acknowledged)**

For gifts of stock not held in a brokerage account, please contact us at DonationQuestions@ThanksUSA.org.

Stock Transfer



Please complete the form below to notify ThanksUSA of your gift and help ensure it is processed accurately. The completed form may be emailed to Jon Rosa at Jon@ThanksUSA.org.

DONOR & SECURITIES INFORMATION

Name and Type of Securities (e.g., Dell common stock): _____

Security Symbol: _____ Number of Shares: _____ Transfer Date: ____/____/____

Donor Name (Individual, Corporation, Foundation): _____

Donor Street Address: _____

Donor City: _____ State: _____ Zip Code: _____

Broker Name: _____

Broker Company: _____ City: _____ State: _____

Broker Contact Information/Telephone: _____

Donor Telephone: _____

Donor Email Address (to be used only if a question arises in the donation process): _____

Donor Signature: _____ Date Signed: ____/____/____

Donor Signature: _____ Date Signed: ____/____/____

NOTE – All account owners must sign this request (e.g., an individual account would require one signature; a Joint Tenants account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering ThanksUSA as the recipient of your charitable gift.