

# Making a Stock Gift:

## A Tax-Effective Way to Turn Appreciated Assets into Community Good

Your gift qualifies for a tax deduction based on the full market value of your stock; plus, if the stock has appreciated in value, you avoid the capital gains tax that would otherwise arise from the sale of this stock.

### To make a gift of stock:

#### 1. Please notify AAACF of your impending gift

In order to track your gift and acknowledge it properly, AAACF needs to know in advance that the gift is coming. **Email Shelley Strickland ([sstrickland@aaacf.org](mailto:sstrickland@aaacf.org)) or call (734) 663-0401 x112 with the following information:**

- Your name
- The name of the publicly-traded security you are gifting to AAACF
- The number of shares you are gifting
- The approximate date the gift is being made
- The name of the AAACF fund to which you are making this contribution

#### 2. Provide this information to your broker or financial advisor to transfer a specific number of shares of a named security that you own directly to AAACF's account.

**In-House Option** — AAACF has an in-house, no fee broker option:

<b>Broker</b>	Charles Schwab & Co.
<b>DTC Number</b>	0164
<b>AAACF's Account Number</b>	2942-9652
<b>Account Name</b>	Ann Arbor Area Community Fdn

**Other Options** — We also work with the following local brokers:

<b>Broker</b>	Robert W. Baird & Co.	CapTrust
<b>Firm Name</b>	Robert W. Baird & Co.	RBC Capital Markets, LLC
<b>DTC Number</b>	0547	0235
<b>AAACF's Account Number</b>	4131-7262	7N601595
<b>Account Title</b>	Ann Arbor Area Community Fdn	Ann Arbor Area Community Fdn

Gifts of mutual funds or closely held stock are also welcome.

The process will be more involved, so please contact Shelley as above for further instructions.

