



## MAKING A GIFT OF STOCK to Care For the Homeless (2021)

**IMPORTANT: Please contact Care For the Homeless (CFH), (212) 366-4459, x217, or have your representative contact CFH, regarding your intention to make a gift of stock, so we can be sure to look for and track the transaction AND credit you with the gift.**

**The simplest and fastest way to make a gift of stock is via the electronic transfer method.**

**Electronic: When you provide CFH with your contact info,** you will be sent a separate document with our account information; you will then instruct your broker to make a "DTC" electronic transfer of your stocks or bonds into the CFH main account. You should inform your broker in writing of your request to make a gift of stock to CFH. *The request should include:* your name, mailing address, number of shares, and stock name.

Please provide a copy of your written instructions to CFH:

Attention: Cathy J. Sharp, Director of Development and Communications

30 East 33<sup>rd</sup> Street, 5<sup>th</sup> Floor, NY, NY 10016

[csharp@cfhnyc.org](mailto:csharp@cfhnyc.org)

Fax: 212-366-1773

Ph: 212-366-4459, x217

For other methods involving the actual stock certificate, please contact your broker for the appropriate process to ensure the safety and security of the documents, and any requirements they may have regarding your authorization, signature, etc.

**Valuation of Securities:** The value of a gift of stock is based upon the mean between the high and low, or the bid and asked, quotations on the day the securities pass from your control. For example, on December 1st, when you mailed your certificates for XX shares of XYZ Corporation to Care For the Homeless or instructed your banker or broker to hold the securities for Care For the Homeless, the high was \$21 and the low was \$19. The mean price is \$20 per share, and the donation value of the gift is that price multiplied by the number of shares contributed to Care For the Homeless.

Beneficiary: Care For the Homeless

Tax ID: 13-3666994

Broker Contact:

Jason E. Salgado

Senior Vice President - Wealth Management

The Waldele Group

Merrill Lynch, Pierce, Fenner & Smith Inc.

225 Liberty Street, FL 40

New York, NY 10281

Tel: 212.236.3995

Fax: 212.553.3161

***PLEASE NOTE: This summary was prepared as an educational service and is not intended as legal or tax advice. Consult your own legal or tax advisor before making any decision based on this information.***