

# 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 Katelyn Videto ([kvideto@aaacf.org](mailto:kvideto@aaacf.org)) or call (734) 663-0401 x117 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 us as above for further instructions.

