

Making a Stock Gift:

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

Making a gift of stock to the Ann Arbor Area Community Foundation (AAACF) is an easy and tax-effective way to fulfill your charitable goals.

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. Notify your broker or financial advisor that you wish to transfer a specific number of shares of a named security that you own directly to AAACF's account at one of the brokers listed below. You will need to give your advisor the following information:

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

2. **Please notify AAACF of your gift**

In order to track your gift and acknowledge it properly, we need to know in advance that the gift is coming. **Email Shelley Strickland (sstrickland@aaacf.org), fax (734) 663-3514, or call (734) 663-0401 to tell us:**

- 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

Gifts of mutual funds or closely held stock are also welcome. The process will be more involved, so please call the Community Foundation's office at (734) 663-0401 and we will be glad to assist you.

