

Make a Gift of Appreciated Securities and Save

An easy way to help CSS is by donating appreciated stocks, ETFs, or mutual funds to us. A gift of appreciated securities is a popular alternative to a cash gift because it can save taxes twice. You receive an income tax deduction for the full fair market value of your securities (if you have held them for more than one year) plus you may also save the capital gains tax on the appreciation. As with any charitable donation, please consult with your tax advisor to determine your eligibility.

Here's how it works:

1. Discuss your charitable donation with your broker, tax advisor, or other financial planner to determine what best meets your needs.
2. Initiate a transfer of appreciated securities (Stocks, ETFs, Mutual Funds) to CSS through your broker. For marketable securities in your brokerage account, please instruct your broker to transfer them to CSS electronically as follows:

Broker Name: Charles Schwab & Co

DTC #: 0164

CSS Account #: 8257-3134

For the Benefit of: Congregation Sha'are Shalom

For the further benefit of: _____ (Program name, if applicable)

Your broker may require an address for Schwab. Please use the following:

Charles Schwab & Co

c/o Citibank NA

399 Park Avenue

New York, NY 10022

3. Notify CSS of your gift by sending an email to stockdonation@shaare-shalom.org

And include the following information:

- Your name, mailing address, email address, and phone number
- The securities you plan to transfer and the number of shares
- The approximate value of the gift

4. CSS then sells the securities and uses the proceeds to fund critical programs and congregational needs.

If you have questions, please contact Shelley Huss, our Treasurer, at treasurer@shaare-shalom.org

DISCLAIMER

This information is not intended as legal or tax advice. Please consult your professional advisor for information on how any gift may affect your tax situation.