

GIFT OF STOCK FORM

Thank you for your interest in making a charitable gift to Area Agency on Aging of Northwest Michigan in the form of a Stock Transfer. Please complete and return the second page of this form to receive your tax-acknowledgement.

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to the Area Agency on Aging of Northwest Michigan. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock, and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to the Area Agency on Aging of Northwest Michigan (tax ID# 38-2056710), please contact Heidi Gustine, Executive Director at 231-947-8920.

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Please complete the information below to notify Area Agency on Aging of Northwest Michigan of your gift and help ensure it is processed accurately. Please fax or email the completed information to (231) 947-6401 or gustineh@aaanm.org.

Donor & Securities Information:

_____	_____	_____	____/____/____
Name and Type of Stock	Security Symbol	Number of Shares	Transfer Date

Donor Name (Individual, Corporation, Foundation)

Donor Street Address

Donor City / State / Zip

Broker Name

Broker Company / City / State

Broker Contact / Telephone Number

Donor Telephone / Email Address (to be used only if a question arises in the donation process)

_____	____/____/____	_____	____/____/____
Donor Signature	Date Signed	Donor Signature	Date Signed

NOTE - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering Area Agency on Aging of Northwest Michigan as the recipient of your charitable gift! Questions? Contact Heidi Gustine at (231) 947-8920.