

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 Jamie Hunter (jhunter@aaacf.org) or call (734) 663-0401 x114 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:

Broker	Charles Schwab & Co.
DTC Number	0164
AAACF's Account Number	2942-9652
Account Name	Ann Arbor Area Community Fdn

Other Options — We also work with the following local brokers:

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

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.

