



# GIFT OF STOCK PROCEDURES

Gifts of appreciated stock are an excellent vehicle for your charitable gift to Craft Alliance. When compared to an outright cash gift, gifts of stock have several advantages.

## The Advantages of Giving Stock:

With a gift of appreciated stock, you will:

- Receive a charitable income tax deduction in an amount equal to the current market value of the stock.
- Avoid liability for the payment of capital gains tax.
- Make Craft Alliance a direct beneficiary of your investment success.

## Making a gift of Stock is easy!

1. Ask your broker to electronically transfer the appropriate shares from your personal account to Craft Alliance's account at Charles Schwab & Co Inc (information below).

**Charles Schwab & Co**

**As a gift from (your name):**

Account #: 4025-1183

DTC: 0164 Code 40

Fed Tax ID: 43-1022226

2. Inform Craft Alliance of your stock gift intentions by faxing or emailing a copy of the directions to your broker to the Development Department at Craft Alliance (fax # 314-725-2068, Jackie.Chambers@craftalliance.org).

## Determining the Value

The value is determined by finding the mean, or average, of the high and low at which the donated stock traded on the date of the gift. The donor is responsible for determining value for tax purposes. (We recommend that you consult with your tax/financial advisor.) Craft Alliance will furnish you with a letter stating the gift date, the name and number of shares, and the amount at which your gift will be recognized.

Information concerning gifts of stock should be directed to: Development Department  
Craft Alliance  
6640 Delmar Blvd.  
St. Louis, MO 63130  
(314) 725-1177, ext. 321  
Fax: (314) 725-2068

## **FURTHER INSTRUCTIONS**

### **To Deposit shares in certificate Form:**

- 1) Certificate of Ownership
- 2) Gifting Letter
- 3) Stock Power Form

### Sample Gifting Letter:

Charles Schwab & Co

RE: *(Name of Stock Position)*

To Whom It May Concern:

We, *(stockholder name(s) as indicated on stock certificate)*, the undersigned jointly and severally agree to gift *(name of stock position and number of shares)* to Craft Alliance, a Not-For-Profit Organization. In gifting this position, we are aware that we hand over all ownership rights.

We further authorize Charles Schwab & Co to receive for deposit *(name of position and number of shares)* into the account for Craft Alliance, Account #4025 -1183.

We agree to indemnify and hold harmless Charles Schwab & Co, Inc, their employees, successors and attorneys from any and all claims, demands, actions, causes of action, or suits (whether at law or in equity), damages, costs, or expenses (including reasonable attorney's fees, if any) that may hereafter arise from the afore stated instructions.

*(Signature of Gifto(r)s and date)*

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### **To Gift via DTC**

- 1) Gifting Letter

### Sample Gifting Letter:

Brokerage Firm

Address

City, State, Zip

RE: *(Name of Stock Position)*

To Whom It May Concern:

We, *(stockholder name(s) as indicated on account registration)*, the undersigned jointly and severally agree to gift *(name of stock position and number of shares)* to Craft Alliance, a Not-For-Profit Organization. In gifting this position, we are aware that we hand over all ownership rights.

We further authorize the gifting to Craft Alliance via DTC #0164 Code 40 to Charles Schwab & Co, Inc. for deposit *(name of position and number of shares)* into the account for Craft Alliance, Account #4025-1183.

*(Signature of Gifto(r)s and date)*

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