



## Gift of Stock by Electronic Transfer

Thank you for your interest in making a charitable gift to Matheny in the form of stock or securities.

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 will pay no capital gains tax. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

The fair market value of your stock gift is determined by the mean value on the date the securities are **received in our account**. It is generally our policy to liquidate any donated stock shares very soon after receiving them, so that we can use the cash proceeds for the purpose you designate.

### **Electronic Transfer**

The easiest way for you to gift stock or securities to Matheny is through an electronic transfer (DTC) from your brokerage account to Matheny's account. Please remind your broker to include your name, contact information and special instructions for the transfer.

**Bank: UBS Financial Services, Inc.**

**FBO Matheny School & Hospital, Inc.**

**Account Number: PT- 25605**

**DTC Number: 0221**

**Reference: Donor Name** (Including your name will ensure the gift is properly acknowledged.)

The donor name is essential for timely acknowledgement. When stocks are transferred electronically, we are informed only of the stock name and the number of shares, not the name of the donor.

**To ensure that your gift is properly credited to you and directed for the purpose you intend please inform Iveth Mosquera of your gift:**

Iveth Mosquera  
Director, Marketing and Development  
Matheny  
908-234-0011, ext. 1273; imosquera@matheny.org  
or call ext. 1260 to speak with Patricia Cats, Development Coordinator  
development@matheny.org

If you or your broker has any general questions, please call Kathy Powers, CFO of Matheny at 908-234-0011, ext. 1227.