



## **Securities Donation Instructions**

One tax-advantaged way for a donor to give a gift to Foster Success, is to donate appreciated securities.

Giving stocks, bonds, and mutual fund shares that have increased in value (and which the donor has owned for more than one year) provides donors with greater tax benefits than giving cash. Not only can the donor deduct the full market value of the securities but also avoid paying capital gains tax on the appreciation.

**Step 1:** Transfer shares held at a securities firm or other brokerage account.

- Provide the following instructions to your financial advisor or the institution where securities are held to transfer the shares to:

Fidelity Investments

100 Crosby Parkway

Covington KY 41015

DTC# 0226

Account number: 656508303

- Instruct your broker to enter identifying information (i.e. your name and address, phone number, account number, broker information) into the "Text Comment" field of the DTC screen.

- If you would like to transfer shares of mutual funds, please contact Michaela H. Crowdus, at (317) 264-2609 or [mcrowdus@goelzerinc.com](mailto:mcrowdus@goelzerinc.com), to make certain that the shares can be accepted. If certificates/shares are in your physical possession, please contact Michaela H. Crowdus for additional instructions.

**Step 2:** Notify Foster Success of your Gift Securities

For Foster Success to identify your gift and send a tax receipt, please provide the gift details requested below:

- o Donor Name
- o Donor Address
- o Donor Phone
- o Donor E-mail
- o Name and Type of Security
- o Number of Shares
- o Approximate Transfer Date
- o Name of Brokerage Firm

E-mail the form to the attention of Travis Tester, Chief Development & Communications Officer, at 317-917-8940 or [Travis@fostersuccess.org](mailto:Travis@fostersuccess.org).