



PO Box 831087 Richardson, TX 75083 www.heroesforchildren.org

Important information about charitable giving with *Stocks*:

Gifts of marketable securities (stock) may be more tax efficient than gifts of cash. As securities grow in value, their sale may require payment of capital gains taxes. A charitable gift of appreciated securities (that have been held for at least a year and a day) in most cases avoids the capital gains tax.

For example, Mr. Davis acquired \$25,000 of stock in the X Corporation a few years ago. The current value is \$100,000. Therefore, if he were to sell the stock today, he would have to pay the current capital gains rates for both Federal and State taxes. Since he has owned the stock for more than a year and a day, he can gift the stock to *Heroes for Children* and receive the full value of the stock as a tax deduction. He would also avoid the capital gains tax on the \$75,000 appreciation.

To ensure efficient processing of your gift of stock, it is important to notify *Heroes for Children* of your gift. Do not rely on your stockbroker or wire transfer service to provide us with this information, as they typically send the stock with no reference to the donor.

How to transfer stock to *Heroes for Children* —if your shares are held in an account:

Ask your broker to make an electronic transfer of the shares to *Heroes for Children* register:

[Ameriprise Financial, Inc. , DTC: 0756](#)

[Heroes for Children, Acct: 3434-9964](#)

Heroes for Children is a registered 501(c)(3) organization with a Federal ID # 83-0489882.
All donations are fully deductible to the extent allowed by US law.



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In some cases you may be asked to provide the Tax ID number of Heroes for Children. Our Tax ID is: 83-0489882.

Once the stock is transferred into *Heroes for Children* account and notification of the transfer is made, a receipt will be sent to you. The effective date is the day that the shares are placed into our account.

Once again, please remember to contact *Heroes for Children* to advise us of the number of shares and the identity of the stock.

How to transfer stock to *Heroes for Children*—if you hold the certificate for your shares:

Sign the stock over to *Heroes for Children*, either by endorsing the back of the certificate or by using the stock power. Make sure to sign exactly as the name(s) appear on the front of the certificate. If you have already had the certificate reissued in the name of *Heroes for Children*, it is not necessary to provide us with a stock power.

Your certificate or stock power should then be mailed to...

Heroes for Children
Attention: Financial Administrator
PO Box 831087
Richardson, TX 75083

Due to the nature of the document being mailed, we recommend that you send it via certified/registered/express mail.

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When the certificate is received, it will be immediately liquidated and a receipt will be sent to you. The effective date is the date of the postmark for certificates registered to the donor, and the certificate date for those that have been reissued in the name of *Heroes for Children*.

Need help? Contact our financial administrator mmaib@heroesforchildren.org or call our headquarters office at 214.256.5616.

Sincerely,

David Hancock Executive Director - Heroes for Children