



## Girls Incorporated of Carpinteria

Tax ID #23-7430292

Thank you for your interest in making a charitable gift to Girls Inc.-Carpinteria in the form of a stock transfer. Please complete and return the second page of this form to receive your tax acknowledgement.

### **BENEFITS OF GIVING A GIFT OF STOCK**

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 avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees, because you are transferring ownership rather than selling the stock.

### **TRANSFERRING A GIFT OF STOCK**

Stock held in a brokerage account may be transferred electronically to Girls Inc.-Carpinteria by contacting your broker using the following account information:

Brokerage Firm: \_\_\_\_\_ Brokerage Number (DTC): \_\_\_\_\_

Account Name: \_\_\_\_\_ Account Number: \_\_\_\_\_

Federal Tax ID Number (TIN/EIN): \_\_\_\_\_

You may complete and return the form to either our email inbox or mailing address listed below:

*Girls Inc.-Carpinteria  
Attn: Donations Department  
5315 Foothill Road, Carpinteria, CA 93013  
information@girlsinc-carp.org  
805-684-6364*

Please consult your tax adviser if you are considering a stock gift, as Girls Inc.-Carpinteria cannot provide tax advice. If you are transferring mutual funds or giving a stock gift certificate, please call our Gift Specialist using the number above before initiating the transfer.

**Thank you again for considering Girls Inc.-Carpinteria as the recipient of your charitable gift!**



# Girls Incorporated of Carpinteria

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## GIFT OF STOCK FORM

### DONOR INFORMATION

Name (Individual, Corporation, Foundation): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### BROKER INFORMATION

Broker Name: \_\_\_\_\_ Broker Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### SECURITY INFORMATION

Name & Type of Securities: \_\_\_\_\_

Security Symbol: \_\_\_\_\_ Number of Shares: \_\_\_\_\_ Date: \_\_\_\_\_

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Security Symbol: \_\_\_\_\_ Number of Shares: \_\_\_\_\_ Date: \_\_\_\_\_

MINISTRY PREFERENCE

Missionary/Project Name: \_\_\_\_\_

Ministry/Project #: \_\_\_\_\_ Amount/Percent: \_\_\_\_\_

Missionary/Project Name: \_\_\_\_\_

Ministry/Project #: \_\_\_\_\_ Amount/Percent: \_\_\_\_\_