



EXCELLENCE IN EARLY EDUCATION

## How to Gift Appreciated Stocks

Gifts of appreciated stock are an excellent vehicle for your charitable gift to Winter Park Day Nursery. When compared to an outright cash gift, gifts of stock have several advantages.

### The Advantages of Gifting 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 Winter Park Day Nursery 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 Winter Park Day Nursery's account with Charles Schwab by using the following information:

**Charles Schwab**

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

Account Name: Winter Park Day Nursery, Inc.

Account #: 66356551

DTC: 0164, Code 40

Federal Tax ID: 59-0638506

2. Inform Winter Park Day Nursery of your stock gift intentions by faxing or emailing a copy of the directions to your broker to the contacts below.

### Determining the Value

The value is determined by the amount received for the stock on the date of the gift. Winter Park Day Nursery 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:

**Ali DeMaria, Executive Director** or

Winter Park Day Nursery  
741 S. Pennsylvania Avenue  
Winter Park, FL 32789  
407.647.0505  
Fax: 407.647.0518

**Margaret Bilby, Relationship Manager**

David Vaughan Investments, LLC  
399 Carolina Avenue, Suite 110  
Winter Park, FL 32789  
407.622.5133  
Fax: 407.622.5135

# Sample Gift Letters

Charles Schwab

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 and number or shares)* to Winter Park Day Nursery, a Not-For-Profit Organization, in gifting this position, we are aware that we hand over all ownership rights.

We further authorize Charles Schwab to receive for deposit *(name of stock and number or shares)* into the account for Winter Park Day Nursery, Account # 66356551.

We agree to indemnify and hold harmless Charles Schwab, its 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)*

Brokerage Firm

Address

City, State, Zip

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 and number or shares)* to Winter Park Day Nursery, 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 Winter Park Day Nursery via DTC # 0164, Code 40 to Charles Schwab for deposit *(name of stock and number or shares)* into the account for Winter Park Day Nursery, Account # 66356551.

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