



## Show Your Appreciation with Appreciated Stock!

# Benefits of Making a Stock Transfer Contribution

### • Take A Charitable Income Tax Deduction

Imagine giving a gift of appreciated securities (stocks or bonds) that benefits CHP families and saves tax dollars all at the same time! It might sound too good to be true, but it is true. Federal law permits taxpayers who itemize to deduct the current value of charitable contributions from their adjusted gross income.

### • Save on Capital Gains Tax

By contributing long-term appreciated securities to the CHP 11-99 Foundation, you avoid the capital gains tax that would otherwise be due if you sold the securities for your personal benefit.

### • Potential Stock Gift Benefits

Please see chart below, which shows an example for someone who has securities with an original cost of \$2,000, and a current market value of \$10,000:

	<b>OPTION A</b>	<b>OPTION B</b>	<b>OPTION C</b>
	<b>Giving Securities</b>	<b>Giving Cash or Check</b>	<b>Sell Securities/Give Cash</b>
<b>Value of Gift</b>	\$10,000	\$10,000	\$10,000
<b>Income Tax Savings</b> (Assuming 35% Tax Rate)	(\$3,500)	(\$3,500)	(\$3,500)
<b>Capital Gains Tax</b> (Assuming 15% Tax Rate)	(\$1,200)	n/a	\$1,200

**Thank you for your consideration – you may use the back side of this form if you wish to donate stock to the CHP 11-99 Foundation.**

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# CHP 11-99 Foundation Stock Transfer Instructions

Thank you for your interest in donating stock to the CHP 11-99 Foundation. Below are the delivery instructions for State Street Corporation, the custodian for the CHP 11-99 Foundation account:

### State Street Corporation

DTC: 987

FFC: BJ63

A/C: 70-304800/CHP 11-99 FOUNDATION

**Note: We cannot accept securities into the account if they are not marketable, nor can we accept mutual funds.**

### Please provide us with the following information:

1. Name of stock and ticker symbol \_\_\_\_\_
2. Expected number of shares to deliver \_\_\_\_\_
3. Broker Name and/or DTC number \_\_\_\_\_
4. Date to be delivered \_\_\_\_\_
5. Donor name(s) \_\_\_\_\_
6. Cost basis and acquisition date (if available) \_\_\_\_\_

You may return this form by fax to **714-529-1191** or email to **Lbanks@chp11-99.org**.  
Should you have any questions, please call **714-529-1199**.

Thank you for helping us continue to support CHP families!

We are very proud to announce that we have again been recognized on the top-rated lists of several charity guides. Read reviews or add a review at:



[www.ocnonprofitcentral.org](http://www.ocnonprofitcentral.org)



[www.guidestar.org](http://www.guidestar.org)

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