



## GIFTS OF STOCK

Donating long-term appreciated securities allows you to deduct the full fair market value without triggering capital gains tax, and Big Brothers Big Sisters receives the full amount of your gift.

Financial Institution: Charles Schwab

Account Name: Big Brothers Big Sisters of Puget Sound

- DTC number is 0164
- Code 40
- Account number is 5569-1884

If you are a Charles Schwab customers you can call 1-800-435-4000

Please contact the Big Brothers Big Sisters of Puget Sound Philanthropy staff at 206-456-9796 if you or your broker if you have any questions.

*Please note:*

**Be certain to notify Big Brothers Big Sisters of Puget Sound of your/your client's stock gift.**

Stock donations transferred directly to our broker arrive in our account with no donor information. For BBBSPS to provide a receipt for a stock gift, it is essential that we know the donor's name and address as well as the type of stock, number of shares, and expected date of transfer.

- Notify BBBSPS of your gift by sending a copy of your authorization letter, contacting our Philanthropy staff at 206.456.9796, or sending an e-mail to [mike.ritter@bbbsps.org](mailto:mike.ritter@bbbsps.org) or [giving@bbbsps.org](mailto:giving@bbbsps.org).

Big Brothers Big Sisters of Puget Sound's EIN/Federal Tax Identification Number (TIN) is 91-0673185.

BBBSPS will issue a gift receipt for your gift which can be used for tax purposes. The gift date is the date that Big Brothers Big Sisters of Puget Sound receives the transferred securities in its account. Stock gifts are valued at the average of the published high and low selling prices for the stock on the gift date. This information will be included on your gift receipt; however, the date and amount may differ from the information that would need to be used to calculate your charitable deduction; please consult with your tax advisor on those issues.