

# Donate Stocks, Bonds, or Annuities

## **Making a stock donations to Plan Curtail:**

Donating highly appreciated stock allows you to avoid capital gains tax on it. It may also allow you to make a larger tax-deductible gift to Plan Curtail than you might otherwise be able to afford.

You or your broker must provide the following information:

- Donor's name and complete address
- Name and number of securities transferred

Please contact Faith Morgan at the time of transfer or for information for electronic transfer of securities:

### **Plan Curtail**

Post Office Box 207, Yellow Springs, Ohio 45387

Tel: (937) 768-5533

Email: [fmorgan@plancurtail.org](mailto:fmorgan@plancurtail.org)

Plan Curtail's Federal Tax ID number: 81-1240356.

Stock gifts are tax deductible for the full value of the stock on the day of sale, providing you have held them long enough to qualify. Consult the IRS or your accountant for requirements.

Plan Curtail can also receive your stock gift though a new account set up by your broker to receive and sell the stock. If your broker prefers to open an account for Plan Curtail, have him/her call Faith Morgan at the phone number above.

**Securities Delivered by Mail:** Electronic delivery of stock shares is more secure and faster than mail. If you prefer, you may transfer certificates by mail. Mail your unsigned stock certificate in one envelope and a stock power letter in a second envelope. If you have already signed your certificate on the back, send it to Plan Curtail by certified mail because a signed certificate is like cash. Mail to Plan Curtail, P. O. Box 207, Yellow Springs OH 45387.

**If you have any questions, call Faith at (937) 768-5533.  
Thanks for your generous support.**