



# FORMAN

## How to Donate Appreciated Securities

Gifts of appreciated securities can provide donors with significant tax benefits. A contribution of appreciated securities entitles the donor to a charitable contribution equal to the fair market value of the securities and none of the appreciation is taxable. For income tax deduction purposes the gift value will reflect the average of the high and low price of the stock on the day it was received in the School's account.

If you wish to transfer securities to the Forman School's brokerage account, please contact your broker at your brokerage firm and ask him or her to make the transfer on your behalf. Your broker should contact Forman's firm and speak with any service representative. The Forman School's firm is:

Vanguard Brokerage Services  
PO Box 1170  
Valley Forge, PA 19482-1170  
800.992.8327

### Your broker should be prepared to provide the following information:

- Account name: The Forman School Brokerage Account
- Account number: 73134107
- DTC number: 0062

### The donor should provide the following information:

- Name of the stock
- Date of transfer
- Purpose of the gift

### The donor should call of the following persons for DTC instructions or with any questions:

Justin Solomon: 860.567.1896, email: [justin.solomon@formanschool.org](mailto:justin.solomon@formanschool.org)

Susan Reis: 860.567.1809, email: [susan.reis@formanschool.org](mailto:susan.reis@formanschool.org)

**Finally**, please contact Susan Reis, Director of Database Management, at 860.567.1809 or [susan.reis@formanschool.org](mailto:susan.reis@formanschool.org) to inform her of the purpose of the gift and the type of securities being donated in order to guarantee that the gift is properly credited and acknowledged.