



STOCKS AND APPRECIATED SECURITIES

You can use appreciated stocks, bonds and/or mutual fund shares that you have held "long-term" (more than one year) to make a gift to The Endowment. You will be able to claim a federal income tax charitable deduction for the full, appreciated value of the securities, not the lesser amount you originally paid for them. In addition, you will pay no capital gains tax on the transaction.

In order to make a gift to the Endowment Fund for Boys and Girls Country, our brokerage account is located at Charles Schwab, account number 1895-3334. The DTC number is 0164. The representatives for Schwab at 1-800-515-2157 will be glad to assist you.

Please note: we are not notified when stock is transferred into our account. In order for us to know of your gift and send a receipt, please call Elaine Petranek at 281-351-4976, extension 219, to notify us of your gift. Upon verification of receipt of your gift, we will furnish you with a Receipt of Charitable Contribution for your tax purposes.