

## Making a Gift of Stock to the Humane Society for Hamilton County

Please call our Donor Engagement Manager at 317-674-0637 to notify us of your plans to make a gift of stock.

### Gifts of Securities:

- Are simple to donate and may provide favorable tax benefits. Appreciated securities, held for more than one year, may be deducted from taxable income without paying a capital gains tax on the appreciated portion of the gift. Please consult your tax advisor for more information regarding your specific tax situation
- Are accepted by The Humane Society for Hamilton County (HSHC), a 501 (c)(3) organization, and are considered for use in the general fund of the organization unless otherwise designated.
- Are credited on the date of transfer to HSHC and are valued at the mean of the high and low quoted sales price on that day. Stock may be donated by electronic transfer Depository Trust Company (DTC) of the shares between your broker and HSHC's broker.

### Broker Information:

Broker: Cooke Financial Group

Contact Person: Adrienne Monka, 317-814-7807, adrienne.monka@cookefg.com

Account Name: Humane Society for Hamilton County, Inc.

Account #: PT8118531

DTC #: 0443

Tax ID #: 35-1610723

### Donor Information: *(required)*

Name of stock donor: \_\_\_\_\_

Description of stock being transferred: \_\_\_\_\_

### For Recognition:

*It is important for us to know the identity of the donors of all securities gifts in order to give prompt and accurate credit for gifts received. Particularly in the case of an electronic transfer, it is often very difficult to obtain this information after the transaction is processed. Therefore, in addition to instructing your broker to include your name and address in the DTC transfer instructions, please provide us with the following:*

Name to be recognized: \_\_\_\_\_

Address: \_\_\_\_\_

Would you like for your gift of securities to be considered a planned gift? ☐ Yes ☐ No

### For more information contact the Humane Society for Hamilton County:

Donor Engagement Manager

Phone: 317-674-0637

Email: donorsupport@hamiltonhumane.com