

## GIFTS OF STOCK

Thank you for your interest in making a charitable gift to the Healthy Homes Coalition of West Michigan in the form of a Stock Transfer. **Please complete and return the second page of this form to receive your tax-acknowledgement.**

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to Healthy Homes. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to the Healthy Homes Coalition (tax ID# 20-5326650), please note the following:

**Brokerage House:** TD Ameritrade  
**Account Name:** Healthy Homes Coalition of West Michigan, Inc.  
**Account Number:** 493 714 690  
**Financial Advisor:** TD Ameritrade  
**Telephone Number:** (800) 669-3900  
**DTC Number:** 0188

Please Note: For mutual fund gifts, or for gifts of stock not held in a brokerage account, please contact the Healthy Homes Coalition directly at (616) 241-3300.

Should you experience any difficulty making your transfer, please contact Executive Director Paul Haan as soon as possible. He can be reached at (616) 241-3300 x301 or [paul@healthyhomescoalition.org](mailto:paul@healthyhomescoalition.org).

# GIFT OF STOCK FORM

Please complete the information below to notify the Healthy Homes Coalition of West Michigan of your gift and help ensure it is processed accurately. Please fax the completed information to (616) 241-3327 or scan and email to *info@healthyhomescoalition.org*.

## Donor & Securities Information:

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Name & Type of Securities (e.g.: DELL common stock)      Security Symbol      # of Shares      Transfer Date

\_\_\_\_\_  
Donor Name (Individual, Corporation, Foundation)

\_\_\_\_\_  
Donor Street Address

\_\_\_\_\_  
Donor City / State / Zip

\_\_\_\_\_  
Broker Name

\_\_\_\_\_  
Broker Company / City / State

\_\_\_\_\_  
Broker Contact / Telephone Number

\_\_\_\_\_  
Donor Telephone / Email Address (to be used only if a question arises in the donation process)

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Donor Signature      Date Signed      Donor Signature      Date Signed

**NOTE** - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering the Healthy Homes Coalition of West Michigan as the recipient of your charitable gift.