

Plan a Gift of Stock

Publically traded securities are an easy gift to make to Assistance League of St. Louis. Consider the amount you wish to give, then decide with your broker which appreciated stock in your portfolio is the best asset to give. There may be capital gains tax advantages to donating stock, in addition to deductions to adjusted gross income. Your tax advisor can help you determine what applies to you.

Your broker may require that you write a letter conveying the stock to Assistance League. Some may require a medallion signature guarantee. Your broker will help you with his or her firm's specific requirements for transfer of stock.

Please notify the Treasurer at Assistance League of St. Louis when you choose to donate stock. We can provide you with a simple form to complete.

Some helpful information:

- DTC Number 0057
- Account Number 20707277-1-0
- Our Brokerage: Edward Jones

Many donors make gifts of stock at yearend. If that is your time frame, it is best to contact your brokerage before the holidays to ensure that your gift does not get delayed by heightened activity at the end of the year.

Assistance League of St. Louis is simply offering suggestions. This is not legal or financial advice. Please consult your financial advisors for information specific to your situation.