



## Smart Ways to Give ~ Stock Transfers

Do you own stock that has increased in value since you bought it? Especially stock that has recently decreased in cost per share? Here's an idea!

1. Transfer shares of stock that you have owned for more than 12 months as a gift to Abe's Garden Community, avoid paying capital gains tax on the appreciation and receive a charitable gift tax deduction for the current value of the stock.
2. "Repurchase" stock at the current, lower price to replace the shares you donated.
3. Your new cost basis will reduce the amount of capital gains tax you will have to pay!

Win-win-win! Of course, you don't have to repurchase stock shares if you don't want to ~ and you still avoid the capital gains tax on the donated shares.

## Stock Transfer Instructions

1. Request your securities or brokerage firm to transfer shares to Abe's Garden's account at Charles Schwab: **Account Number: 1421-7541**      **DTC Number: 0164-Code 40**
2. Instruct your broker or bank to include YOUR NAME in the "Text Comment" field of the DTC screen.
3. Please notify Donna Coleman at [dcoleman@abesgarden.org](mailto:dcoleman@abesgarden.org) and the development department at [admin@abesgarden.org](mailto:admin@abesgarden.org) when your transfer is requested to ensure that your gift is properly credited.

If you have questions, please contact:  
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