



SHOREWOOD FOUNDATION

CELEBRATE. CONNECT. SUSTAIN.

Instructions for Gifting Stock or Securities to the Shorewood Foundation

Thank you for your intention to transfer a gift of stock or securities to the Shorewood Foundation. Donating appreciated securities is a tax-smart way to support our community while maximizing the impact of your gift.

Why Give Stock?

Tax Benefits of Giving Appreciated Securities:

- **Avoid capital gains tax** on the appreciation of securities held for more than one year
- **Receive a charitable deduction** for the full fair market value of the securities

How to Transfer Your Gift:

To make a tax-deductible gift of an appreciated security, please transfer the stock or mutual fund to the Shorewood Foundation via our account at Baird.

Delivery Details for Your Financial Advisor:

Brokerage Firm: Robert W. Baird & Co. Incorporated

DTC Number: 0547

FFC Account #: 4362-2244

Account Name: Shorewood Foundation Inc.

Important: Please instruct your financial advisor to include your name on the transfer request so that we may properly recognize your generous gift.

Please Notify Us in Advance:

If possible, please contact us in advance of the gift and provide the following information:

Information Needed:

- Name of Stock/Security to be transferred
- Number of shares to be transferred
- Approximate date transfer will occur
- Designation (if any) of your gift (e.g., Summer Sounds, Farmer's Market, Fourth of July, Shorewood Feast, Friends of Atwater Beach, Public Art, or General Fund)

After Your Gift:

After we have received your gift, we will send you a receipt for the charitable donation. This receipt will acknowledge the date and description of the securities received, which you can use for your tax records.

Tax Information:

Shorewood Foundation Tax ID #: **39-6081099**

The Shorewood Foundation is a 501(c)(3) nonprofit organization. All contributions are tax-deductible to the extent allowed by law.

Questions?

If you have any questions about transferring stock or securities to the Shorewood Foundation, please contact us:

Email: theshorewoodfoundation@gmail.com

Mail: Shorewood Foundation, 4230 N Oakland Ave #307, Shorewood, WI 53211-2042

***Disclaimer:** This information is provided for educational purposes only and should not be considered legal or tax advice. We encourage you to consult with your financial advisor or tax professional to understand the specific tax implications of your gift and to ensure this giving method is appropriate for your situation.*

Thank you for your generous support of the Shorewood Foundation!