

TAKE STOCK IN UNITED WAY OF ADAMS COUNTY



You can realize tax savings in multiple ways by contributing stock as a gift to United Way:

1. **Charitable Deduction** - Federal law permits taxpayers who itemize to deduct the current value of charitable contributions from their adjusted gross income
2. **Avoidance Capital Gains Tax** - Stock contributors may have no capital gains tax liability on the difference between what they paid for the donated stock and its current fair market value (FMV).

HOW TO GIVE

If you hold securities in “street name”, that is, you do not have physical possession of the stock certificate please notify your broker to initiate “broker to broker” transfer. This will transfer the donated stock from your brokerage account to United Way’s brokerage account, at which United Way will liquidate the donated stock. Call United Way at 717.334.5809 for specific instructions regarding a stock transfer.

VALUATION FOR TAX PURPOSES AND DATE OF GIFT

1. The effective date of the gift is the day the stock is transferred to the UWAdams
2. The \$ value of the donated gift for income tax purposes is the mean of the high and low selling prices on that effective date
3. Your gift will be acknowledged by UWAC for tax purposes, noting the effective date and value of donation

BROKER/ACCOUNT INFORMATION

1. **United Way Broker:** Charles Schwab
2. **Broker DTC Number:** 0164
3. **Account Name:** United Way of Adams County
4. **Account Number:** 3274-9123
5. **United Way Fed Ein:** 23-1663379

FOR QUESTIONS OR ADDITIONAL INFORMATION

Please call Laura McMahon at 717.334.5809 or email Lmcmahon@uwadams.org

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