



## MAKING A GIFT OF STOCK OR MUTUAL FUNDS TO THE ACLU FOUNDATION OF NORTHERN CALIFORNIA

Thank you for your interest in making a gift of stock to the ACLU Foundation of Northern California!

Making a gift through a transfer of stock is often advantageous from a tax point of view, especially if you own appreciated stocks on which you would have to pay long term capital gains tax. By making the gift directly to the ACLU Foundation of Northern California, you avoid the capital gains tax on the appreciation of the asset, and will realize an income tax deduction in the amount of the asset's fair market value on the date of the gift.

Each individual's tax situation is different, so please be sure to consult your tax advisor about the best way to make your charitable gifts.

Please follow this process for making a gift of stock to the ACLU Foundation of Northern California:

- Contact Elizabeth Phung, Development Operations Manager at the ACLU Foundation of Northern California (415.621.2493 x331 or [ephung@aclunc.org](mailto:ephung@aclunc.org)). **It is very important that you alert us that you are making a gift of stock so that we may provide you with a donation acknowledgment letter for your tax purposes.**
- Ask your broker to transfer the asset directly to the American Civil Liberties Union Foundation of Northern California account with Morgan Stanley Wealth Management. Have your broker call Cathy L. Kosley, the ACLU's broker, at 415-693-6673, to alert her of the transfer.
- You will need the following information to complete the transfer:

ACLU Foundation of Northern California account number: **101-119026-819**

The account is with the Morgan Stanley Wealth Management office at **101 California Street, 3<sup>rd</sup> Floor, San Francisco, CA 94111**

DTC number: **0015**

*Your broker should not use the DTC number without first speaking with Cathy L. Kosley*

Some brokers also like to know the ACLU Foundation of Northern California's Tax Identification Number: 94-0279770. This number substantiates that your gift is tax-deductible.

Should you or your broker have questions, do not hesitate to contact Elizabeth Phung, Development Operations Manager. Elizabeth can be reached at 415.621.2493 x331.

Thank you!