



## Child Crisis Arizona

*Safe kids. Strong families.*

### **Gift of Securities**

Giving appreciated securities is a great way to support Child Crisis Arizona. This type of gift can help you avoid capital gains tax while allowing you to claim a tax deduction equal to the fair market value of the gift at the time of the transfer. The date of your gift will be the date the securities will be received in Child Crisis Arizona's brokerage account. Child Crisis Arizona can sell the securities, tax free, and use the funds to achieve your wishes.

### **Please note**

Security transfers do not include the donor's name or address. To ensure that your gift is recorded and acknowledged correctly, you **MUST** provide the following information to Child Crisis Arizona before transferring shares;

- Your name, address, phone number
- Your broker's contact information
- Number and type of shares transferred
- Approximate date of transfer
- Special Instructions (preferred recognition/anonymity/gift purposes/etc.)

Please notify:

#### **Karen DeCarlo**

Director of Individual & Legacy Gifts

[Karen.decarlo@childcrisisaz.org](mailto:Karen.decarlo@childcrisisaz.org)

main 480.834.9424

direct 602.926.9158

#### **INFORMATION TO SHARE WITH YOUR BROKER;**

**ACCOUNT NAME:** Child Crisis Arizona

**FED TAX ID #:** 86-0324144

**ACCT #** 3BU16942

**DTC #** 0701

**BROKERAGE:** Cetera Investment Services (602.824.5712)

Child Crisis Arizona recommends you consult your legal and/or financial advisors what type of gift best suits your unique circumstances.

This information is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.