



### **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.)

### **To transfer securities:**

Please instruct your current broker / custodian to "DTC" your donation to the Child Crisis Arizona account at Fidelity Investments. Your broker will most likely require you to provide them with a written "LOA" = Letter of Authorization which indicates the name of the security, the number of shares and includes the following delivery instructions:

#### **Account Name: Child Crisis Arizona**

Fed Tax ID #: 86-0324144

Fidelity Account #655-235955

DTC Clearing #0226

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

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.