



## **Thank you for supporting FLIP through a gift of stocks, bonds, mutual funds, or your IRA**

**Benefits of making a gift of stocks, bonds, or mutual funds**—A gift of stock may provide more benefits than a cash gift. When you make a gift of stock to Friends of Lopez Island Pool, by eliminating the capital gains tax that would be due upon selling the stock, you receive tangible tax-savings and benefits while also supporting the mission. A gift of stock may be right for you if:

- You are holding stocks that have risen in value; if your stocks are highly appreciated. By using these securities as a gift, you can avoid the capital gains tax on any paper profit.
- You would like to maximize your deduction while not affecting your liquidity. If you decide to make a gift of stock, you not only retain your cash assets, but you also receive a charitable tax deduction for the full fair-market value of the stock that you've owned for more than one year.

**Benefits of giving from your IRA: Qualified Charitable Distribution**—A qualified charitable distribution (QCD) is a distribution of funds from your IRA directly to a qualified charitable organization, such as Friends of Lopez Island Pool. If you are 70 1/2 years old (or older) and need to take required minimum distributions (RMDs), your QCD may count toward your annual IRS requirement. A donation to FLIP would count toward your RMD, but is not included in your adjusted gross income—up to a maximum of \$108,000 (2025) annually, with some exceptions. Please consult your tax advisor for information regarding your specific exceptions.

### **FLIP Brokerage Information**

c/o Brokerage Firm: Charles Schwab, Joel Wing, VP, Financial Consultant, 200 South 108<sup>th</sup> Ave., Omaha, NE 68154.  
Phone 402-278-9649

DTC Number: 0164 Account Number: 62783086

Account Name: Friends of Lopez Island Pool, PO Box 453, Lopez Island, WA 98261-0453;

IRS EIN 26-2079787

**FLIP Contact** Please notify [Director@lopezislandpool.org](mailto:Director@lopezislandpool.org) and FLIP Investment Advisor Tom DiGiorgio at [Tom.DiGiorgio@lopezislandpool.org](mailto:Tom.DiGiorgio@lopezislandpool.org) (Phone 206-579-7856) of your gift to FLIP.

**FRIENDS OF LOPEZ ISLAND POOL is a 501(C)(3) nonprofit.**

Consult a tax advisor to explore how donations of stocks, bonds, mutual funds, or giving from your IRA fit into your financial strategy for the current tax year and beyond.



## GIVING SECURITIES TO FRIENDS OF LOPEZ ISLAND POOL

Thank you for considering a gift of securities to Friends of Lopez Island Pool. To facilitate electronic transfer, receipt, and proper acknowledgement of your gift, please provide your broker with these delivery instructions. It is very important that you also complete the form below and e-mail, mail, or otherwise deliver it to us. Shares of stock and mutual funds are often received by our broker without the donor's identity included, so completing this simple form will help us identify your gift quickly. If you prefer, you can e-mail the information about your gift to [tom.digiorgio@lopezislandpool.org](mailto:tom.digiorgio@lopezislandpool.org) and [director@lopezislandpool.org](mailto:director@lopezislandpool.org).

If you have **stock certificates**, please contact email [tom.digiorgio@lopezislandpool.org](mailto:tom.digiorgio@lopezislandpool.org) for instructions. Also, if the value of your securities has declined since you purchased them, it may be to your advantage to sell them and give the cash proceeds instead. Please check with your professional advisor for details.

### Delivery Instructions

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### Gift Details

Donor Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Broker Name: \_\_\_\_\_ Broker Phone: \_\_\_\_\_

Broker Firm: \_\_\_\_\_

Name of Security: \_\_\_\_\_ Ticker: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Expected Date of Transfer: \_\_\_\_\_