



Stock Donation Form

Gifts of Stock

Giving a gift of appreciated stock is an easy, meaningful way to support us. If you have owned shares of stock for more than one year, you are eligible for tax benefits upon transfer of those shares. You can claim a charitable income tax deduction equal to the stock's value at the time of transfer, and you are exempt from paying capital gains tax on the increased value.

To transfer a gift of stock to Senior Services for South Sound, simply provide your broker with this information:

Senior Services for South Sound's Broker: First Allied Securities, Inc.

Account Name: Senior Services for South Sound

Account Number: 870852

DTC Number: 2663

Senior Services for South Sound Tax ID Number: 91-0907573

Please notify Pam Toal of your intent to make a gift of stock, so that we can acknowledge your gift and provide you information for your tax return.

Please notify us of your intent at:

Pam Toal, Gift Planning Manager

360.586.6181, ext. 106

ptoal@southsoundseniors.org

Senior Services for South Sound

222 Columbia St NW

Olympia, WA 98501