

A GIFT OF APPRECIATED SECURITIES



Keeping families close™

Atlanta RMHC's mission is to nurture the health and well-being of children and families.



Marissa Greider

Senior Director
of Major and
Planned Gifts

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Note: This information is not intended as legal or tax advice. To ensure the best match for your individual goals and charitable vision, please consult with an attorney or professional advisor.

SAVE IN TAXES THIS YEAR

If you would like to support **Atlanta Ronald McDonald House Charities** with a tax-smart donation this year, a gift of appreciated stocks, bonds or other marketable securities that you have held for more than one year may be the right gift for you.

YOUR BENEFITS

When making a gift of appreciated securities owned for more than one year, you will receive a double tax benefit:

1. You are entitled to a federal income tax deduction based on the current fair market value of the securities, regardless of their original cost.
2. You will be exempt from paying capital gains taxes on any increase in the value of the securities since you acquired them — taxes you would pay if you had otherwise sold them.

STEPS TO TAKE TO MAKE YOUR GIFT

1. If you have the physical securities, either hand deliver them to us or mail us the stocks and stock power separately.
2. If you don't have possession of the physical securities, instruct your broker to electronically transfer your intended shares and notify **Marissa Greider** once the transfer is complete to ensure we correctly identify your gift.
3. Transfer instructions and donation form can be found at armhc.org/stock-transfer.

Please inform your broker that the stock should be directed to the following account:

Morgan Stanley Wealth Management
DTC # 0015
Account Number 523-110494

Contact: Janet Ash
Client Service Associate, Morgan Stanley
770-643-7605
Janet.L.Ash@morganstanley.com

How It Works

