



# GIFTS OF APPRECIATED SECURITIES



**1** You **MAKE A GIFT** of appreciated securities



**2** You receive an **INCOME TAX DEDUCTION**



**3** Children's Hospital of Pittsburgh Foundation **SELLS THOSE SECURITIES**



**4** Your **GIFT IMPACTS** Children's Foundation

## HOW YOU CAN GIVE HOPE

**YOU CAN SUPPORT** the patients and families we serve here at UPMC Children's Hospital of Pittsburgh and receive a double tax benefit by making a gift of appreciated securities.

1. You can forward your stock certificates to Children's Foundation or make an electronic transfer from your account to ours.
2. You receive an income tax deduction.
3. Your gift gives hope to our patients and families

### BENEFITS:

- You may be eligible to receive a federal income-tax deduction for the full fair-market value of the securities
- You can avoid or reduce long-term capital-gain tax on appreciation in the value of the stock
- Your gift will support Children's Hospital of Pittsburgh Foundation



## HOW TO MAKE A GIFT OF APPRECIATED SECURITIES

**STEP 1** **CONTACT MEGAN BURDELSKY**, Legacy Giving Officer, to let us know that you are interested in making a gift of appreciated securities at **412-692-5057** or **megan.burdelsky@chp.edu**.

**Be sure to include the following information:**

- Donor's name and complete address
- Name and number of shares to be transferred
- Date of the transfer
- Hospital program to which the gift should be directed

**STEP 2** **TRANSFER THE SECURITIES** using one of the following options:

**ELECTRONIC TRANSFER**

Your broker may transfer securities electronically into Children's Hospital of Pittsburgh Foundation's account.

<b>Brokerage:</b>	Merrill Lynch (412-566-6661)
<b>DTC (Direct Transfer Code) Number:</b>	8862
<b>Account Name:</b>	Children's Hospital of Pittsburgh Foundation
<b>Tax ID #:</b>	25-1865744
<b>Account Number:</b>	848-02541

**PHYSICAL TRANSFER**

You may forward your stock certificate(s) directly to Children's Foundation. Each stock certificate requires a stock power form. The stock powers should be signed, and the signature guaranteed by your local bank or broker.

Mail the stock powers, along with a letter indicating your intent to make a gift, to the address below. Under separate cover, send the stock certificate(s) to the same address. For additional protection, we recommend that you send the certificate(s) via registered mail.