



## HELPING US TO PROVIDE HOPE FOR CHILDREN

### *STOCK DONATIONS*

Your stock donation can benefit you.

*Support of us through stock donations can help you to save on capital gains taxes.*

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The gift of an asset, often common stock or mutual fund shares, is a valuable way to make a contribution and receive tax benefits based on the value of the assets.

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For example, if you had 200 shares of XYZ Corp that you had purchased at \$15 a share years ago, and the current value in today's market is \$36 a share, and you decided to sell your stock, you would have a taxable long-term capital gains of \$4,200, which is the difference between your original cost and what you would receive from the sale. ( $\$36 - \$15 = \$21$  capital gains per share)

If instead of selling the stock, you donate your 200 shares to the Joe Torre Safe At Home Foundation, you would not incur any capital gains **and** would be able to deduct the current value of \$7,200 (200 shares x \$36 = \$7,200) as a charitable gift.

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By donating the stock, we would receive more than if you had sold the stock and then donated the proceeds after deducting the capital gains taxes, and you receive a greater tax deduction by giving the stock directly to us and avoiding any capital gains tax.

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You will find our stock donation account information within the attached Sample Letter that you can send to your stock broker. If you'd like more information, please reach out to us at [contact@joetorre.org](mailto:contact@joetorre.org) or at 212-880-7360.

## Sample Letter to Broker

Dear:

I would like to make a gift of stock on **[insert date]** to the Joe Torre Safe At Home Foundation. Please transfer **[number]** shares of **[company name]** to the Joe Torre Safe At Home Foundation **[indicate month, year, when you would like transfer to occur]**.

Use the following transfer instructions:

Charles Schwab & Co., Inc.-Charles Schwab Bank  
Zubin Hodiwalla  
Charles Schwab Grand Central Investment Center  
60 East 42nd Street - Ground Floor New York, NY 10017  
Tel: 212-450-1804 Fax: 212-450-1811  
Email: zubin.hodiwalla@schwab.com

Please include your name, if not anonymous, and:

**Delivery to DTC Clearing 0164, Code 40**

**Account Name:** The Joe Torre Safe At Home Foundation (Tax I.D. Number 03-0442514)

**Account Number:** 7738-9850

Please notify the Joe Torre Safe At Home Foundation Development Department of the gift being transferred.

Contact information is as follows:

The Joe Torre Safe At Home Foundation  
Development Department  
55 West 39<sup>th</sup> Street- Suite 600  
E-mail: robert@joetorre.org  
Phone: (212) 880-7372  
Fax: (212) 560-8919

The Joe Torre Safe At Home Foundation will also provide me with a receipt for this gift.

Thank you for your prompt attention to this matter.

Sincerely,