



Gift of Appreciated Securities or Stock

By donating appreciated securities or mutual funds you have held more than one year, you can reduce or even eliminate federal capital gains taxes on the transfer. You are also entitled to a federal income tax charitable deduction based on the fair market value of the securities at the time of the transfer.

Information you'll need to make a stock transfer gift to the Hoover Presidential Foundation:

Charity Name: Hoover Presidential Foundation

Charity Tax ID#: 42-0848288

Charity's Mailing Address: P.O. Box 696, West Branch, IA 52358

Charity's Email Address: RJohnson@HooverPF.Org

Charity's Phone Number : 319-643-5327

Broker Institution : Morgan Stanley Wealth Management Office

Broker Address: 1080 Jordan Creek Pkwy, Ste 400N, W. Des Moines, IA 50266

Charity Account Name: Hoover Presidential Foundation

Brokerage Account #: 316-014265-042

Electronic Transfer Number (DTC): 0015

For assistance or questions, please contact our liaison:

Jill Lansing, Morgan Stanley Wealth Management Office

Phone: 515-283-7041

E-mail: Jill.Lansing@Morganstanley.com

Please make us aware of your intentions to make a gift of stock as we often receive stock without the donor identification attached and will not be able to give you tax credit. To do so please contact **Hoover Presidential Foundation's Financial Manager, Ryan Johnson, with the following information to better facilitate the process:**

- Name or ticker symbol of the stock to be transferred
- Approximate number of shares to be transferred
- Ryan Johnson, Financial Manager, Hoover Presidential Foundation Office phone: 319-643-5327 E-mail: RJohnson@HooverPF.org

Note: This above information is for gifts of equities or stock only. Gifts of mutual funds require a separate process and timeline. Please contact Ryan for mutual funds transfers.

The information on this website is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in for hypothetical purposes only and are subject to change. References to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.

