HOOVER
PRESIDENTIAL FOUNDATION

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:

DTC: 0015
Account: 316-014265-042
Name of: Hoover Presidential Foundation

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**

Also, please make us aware of your intentions to make a gift of stock. Without such notice, gifts of stocks may be transferred to the Foundation with the identity of the donor unknown, making proper credit and timely acknowledgement extremely difficult.

Contact Hoover Presidential Foundation 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 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.

Contact Shelly Mott, Hoover Presidential Foundation Vice President, at **SMott@HooverPF.org** or 319-643-5327 for more information.

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.