

## GIFT OF STOCK

Thank you for your interest in making a charitable gift to the Fred Wells Tennis & Education Center, Inc. (FWTEC) in the form of a Stock Transfer. **Please complete and return the second page of this form to receive your tax acknowledgment.**

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to FWTEC. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to FWTEC (Tax ID# 41-1965977), please note the following when contacting your broker:

- Brokerage House: Fidelity Investment
- Account Name: Fred Wells Tennis & Education Center, Inc.
- Account Number: 645003388
- DTC Number: 0226
- Reference: Donor Name (Including your name will ensure the gift is properly acknowledged.)

## GIFT OF STOCK DONATION FORM

Please complete the information below to notify FWTEC of your gift and help ensure it is processed accurately. Please email the completed information to [christine@fwtec.org](mailto:christine@fwtec.org).

**Donor & Securities Information:**

|  |                 |                  |                |
|--|-----------------|------------------|----------------|
| _____  | _____           | _____            | ____/____/____ |
| Name & Type of Securities(e.g.: DELLcommonstock) | Security Symbol | Number of Shares | Transfer Date  |

\_\_\_\_\_  
Donor Name (Individual, Corporation, Foundation)

\_\_\_\_\_  
Donor Street Address

\_\_\_\_\_  
Donor City / State / Zip

\_\_\_\_\_  
Broker Name

\_\_\_\_\_  
Broker Company / City / State

\_\_\_\_\_  
Broker Contact / Telephone Number

\_\_\_\_\_  
Donor Telephone / Email Address (to be used only if a question arises in the donation process)

|                 |                |                 |                |
|-----------------|----------------|-----------------|----------------|
| _____           | ____/____/____ | _____           | ____/____/____ |
| Donor Signature | Date Signed    | Donor Signature | Date Signed    |

NOTE - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer-matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering FWTEC as the recipient of your charitable gift