



Communities
In Schools®

Eastern Pennsylvania

AMPLIFY YOUR IMPACT

GIVE APPRECIATED STOCK

Do you own stock that has increased in value? Have you owned this stock for more than a year? If you answered “yes” to both questions, we have good news for you!

You can amplify your impact by donating appreciated stock to **Communities In Schools of Eastern PA**. Many supporters find that giving stock actually helps them do more than what’s possible when giving cash. By joining these thoughtful investors, you too can yield high returns for students in need across our region.

TAX SAVINGS...

There’s more! You can enjoy a **double tax benefit** when you donate appreciated stock. You may claim a **tax deduction** for what the stock is worth today as opposed to what it cost you many years ago. You may also avoid paying **capital gains tax** on the transfer of the stock. This would not be the case should you decide to first sell the stock and then donate the proceeds.

HOW TO GIVE...

Giving stock to CIS is simple. By working with your broker, you can donate stock electronically or by registered mail. It’s also possible to name CIS as a beneficiary of your stock account(s) – a popular option for our supporters who desire more flexibility.

No matter if you decide to give now or later, a gift of appreciated stock can help you amplify your impact and create meaningful change close to home.

WE’RE HERE TO HELP...

If you and your broker need more information about donating stock, bonds, mutual funds and other investments please **contact Maria Esposito at (484) 891-1758 or Espositom@ciseasternpa.org**.

Please find our stock transfer instructions on the reverse side.

You can make your gift of appreciated stock by completing three simple steps:

Step 1: Initiate the Gift

The first step is to notify your broker of your desire to make a gift of appreciated stock. You can then work with your advisor to select the stock that will be transferred to CIS. Your selection should, of course, align with your charitable and financial goals.

Step 2: Send the Stock

Sending Electronically:

Please deliver by DTC to: **Charles Schwab & Co., Inc.**
399 Park Avenue
New York, New York 10022

For Deposit To: **Communities In Schools of Eastern Pennsylvania**
Tax ID# 23-2222874
DTC Clearing #: 0164, Code 40
Account Number: 4827-0397

Sending by Registered Mail:

If sending by registered mail, you should send your unendorsed certificate(s) with a Stock Power Form, and a Stock Waiver Form in separate envelopes, to:

CIS of Eastern PA
Attn: Maria Esposito
739 N. 12th Street
Allentown, PA 18102

Step 3: Notify Us

To ensure your gift is processed in a timely manner, it's important that we know your stock gift is on the way. Please call Maria at (484) 891-1758 or notify her by email at EspositoM@ciseacternpa.org.

Please Note: For tax purposes, the Gift Date is recognized as the date the shares enter CIS' clearing account at Charles Schwab or the date the stock is sent by registered mail. Your gift will be valued based on the average price (the mean between the highest and lowest selling prices) of the stock on the date of the gift.

