

Making A Gift of Securities

Thank you for making a gift of stock or other securities to the Unitarian Universalist Fellowship of Winston Salem.

Gifts of appreciated securities often offer special tax benefits for the donor including elimination of capital gains tax and a charitable deduction equal to the current market value of the security, subject to IRS guidelines.

Please notify the Unitarian Universalist Fellowship of Winston Salem of the name of the securities you are giving and when they will be transferred.

Because electronically transferred gifts often do not indicate the owner of the assets, securities sent without advance notification can be difficult to match to the donor. Securities held in paper certificate form may also be given to UUFWS; please call TD Ameritrade for delivery instructions.

In accordance with IRS guidelines, the date of your gift will be the date on which the securities are received in the UUFWS brokerage account. For crediting purposes, the value is determined as the average of the high and low trades for the security on that date. In the case of unlisted securities, the value must usually be determined through an independent appraisal provided by the donor.



**UNITARIAN
UNIVERSALIST
FELLOWSHIP**
of Winston-Salem

Please instruct your broker to include all of the following information on the brokerage ticket:

1. Your name
2. Unitarian Universalist Fellowship of Winston-Salem
3. UUFWS TD Ameritrade Account Number - 427802922
4. TD Ameritrade DTC Number - 0188

It is important that you call or email Fellowship Administrator, Cathy Kelley at 336-659-0331 or administrator@uufws.org to inform her of the transfer, including the name of the securities and how the proceeds are to be used.

If you need any additional help, please contact Cathy Kelley or call TD Ameritrade at:

TD Ameritrade
1247 Creekshire Way
Winston Salem, NC 27103

Phone: 336-666-9036

Branson Davis
Branch Manager

Ken Wiles
Stock Broker

Alex Anderson
Office Assistant