



## Stock Transfer Instructions

In partnership with the Gazette Charities-El Pomar Foundation Empty Stocking Fund, Pikes Peak Community Foundation is providing the option to gift appreciated securities to support the 2018-2019 holiday campaign.

*Please note: it is extremely important that you notify the Community Foundation when transferring securities into this account so that we may credit your gift to the Empty Stocking Fund Gift Fund at the Community Foundation.*

### What we need from you

Please fill out the accompanying “Stock Transfer Notification Form” and send directly to Leslie Sabin, Director of Finance, at Pikes Peak Community Foundation.

### Information for your investment manager

Share the following directions with your Manager to successfully complete a transfer of stock to the Community Foundation:

#### **Morgan Stanley Wealth Management**

**DTC:** 0015

**Account:** 320-112968

**Account Name:** Pikes Peak Community Foundation

Please notify Leslie Sabin, Director of Finance,  
of any stock transfers

#### **Leslie Sabin, CPA**

Director of Finance, PPCF

lsabin@ppcf.org

719-445-0603

If you need assistance from Morgan Stanley,  
please contact

#### **Shari Losinski**

The Jensen Group, Morgan Stanley

shari.l.losinski@morganstanley.com

719-577-6326

## Benefits of Gifting Stock to the Empty Stocking Fund

Gifts of publicly traded securities are one of the most tax-efficient ways to give. Donate shares of low-basis, highly appreciated stock or mutual funds to the Empty Stocking Gift Fund at Pikes Peak Community Foundation to rebalance your portfolio and reset any capital gains earned on stocks. If you want to keep the security you donate in your personal portfolio, you can re-purchase the same security at the new, higher basis and reduce future capital gains.

**Example:** You have a stock currently worth \$15,000 that you purchased for \$2,500. If you donate the stock directly to PPCF, you can avoid \$1,875 in capital gains taxes that you would pay if you sold the stock and donated the proceeds. You would also receive a charitable deduction worth \$15,000.