

## Gifts of Appreciated Securities

A gift of appreciated securities (owned for more than one year) to The Rotary Foundation can greatly benefit a donor by providing tax benefits through a charitable income tax deduction.\* On the gift date, the donor would

- ✧ Receive a charitable income tax deduction for the full fair market value of the securities
- ✧ Avoid paying capital gains taxes on the appreciated securities resulting from the sale of the securities
- ✧ Help The Rotary Foundation further its humanitarian, educational, and cultural exchange programs

### For example:

Ten years ago, Rotarian and Mrs. Smith invested US\$10,000 to purchase 1,000 shares of common stock at \$10 per share. Today, the stock is worth \$30 a share for a total value of \$30,000, a capital gain of \$20,000.

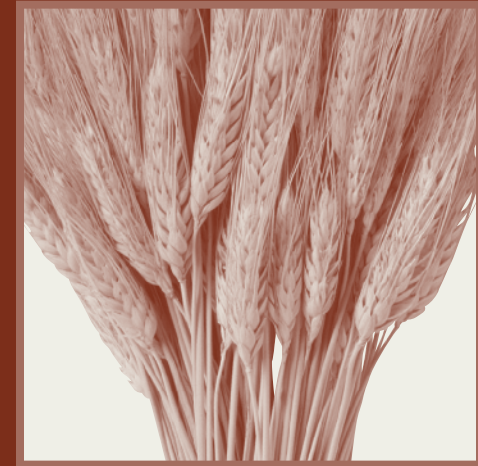
If the Smiths sold the stock outright, they would pay a capital gains tax of \$3,000 or 30 percent of the amount originally paid on the stock. If the Smiths gifted the stock to The Rotary Foundation, they would receive a \$30,000 charitable deduction with a five-year carryover and avoid any capital gains taxes.

\*Please check with your financial adviser on how these tax benefits may apply to your situation.

*“As a donor,*

*I learned that a stock gift benefits both the Foundation and the donor. Through Rotary, your gift of stock can help world peace, provide for unmet human needs, and add to goodwill and understanding among people around the world. How can one be more efficient and effective in charitable giving? ”*

**R. Sterling Spafford**  
Salt Lake City, Utah  
Past District Governor  
District 5420



*...a gift of stock  
...a gift of stock can help world peace...  
can help...*



If you have questions, please contact:

Gift Administration / FN120  
The Rotary Foundation  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
Telephone: 847-866-3380  
Fax: 847-866-2095  
[www.rotary.org](http://www.rotary.org)



The Rotary Foundation

*“...ADD TO goodwill AND  
understanding  
AMONG PEOPLE...”*

Donors may transmit gifts of marketable securities to The Rotary Foundation through their broker or by mail. In each case, a letter or notice of transmittal form like the one attached outlining the intended purpose of the gift is appreciated. Privately held or other gifts of securities must be reviewed by The Rotary Foundation prior to acceptance. Please note that contributions to the Donor Advised Fund or to fund Life Income Gifts use separate stock transfer instructions. Please contact Planned Giving at 847-866-3100 for the proper forms.

*The mission of The Rotary Foundation of Rotary International is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.*

## Through a Broker

Brokers may transfer securities directly to the Foundation's brokerage account using the following account information.

### In the United States:

DTC Eligible Securities

DTC # 0443

Pershing, LLC

Account #: N7M100012

Account name: The Rotary Foundation of Rotary International

Fed Eligible Securities

ABA # 021-000-018

Bank of NY/Pershing

Account #: N7M100012

Account name: The Rotary Foundation of Rotary International

The date securities are received in the Foundation's brokerage account is the date of the gift.

## By Mail

Stock certificates endorsed to The Rotary Foundation should be sent by registered or insured mail to Mellon Securities Trust Company (MSTC) at the below address.

A donor may also transfer stock by completing a stock power form (available from any broker) and mailing it to MSTC. The signature(s) on the stock power must match the title on the stock certificate and be signed by all named parties. The stock certificate should remain unsigned and be mailed to MSTC in a separate envelope. The postmark date on the envelope is the date of the gift.

Mellon Securities Trust Company (MSTC)

1 Wall Street

3rd Floor – Receive Window C

Attn: Mike Visone

Ref: The Rotary Foundation of Rotary International Gift Account

New York, NY 10286

## Notice of Transmittal Gift of Securities

MY GIFT WILL BE MADE AS FOLLOWS:

My gift is worth approximately US\$ \_\_\_\_\_.

I have notified my broker to wire transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock  
Number Company  
to The Rotary Foundation.

I have sent a physical certificate to Mellon Securities Trust Company (MSTC) for \_\_\_\_\_ shares of \_\_\_\_\_ stock.  
Number Company

The completed stock power form was sent under separate cover.

I would like to speak with someone about giving stock or mutual fund shares.  
Please call me at \_\_\_\_\_.

PLEASE DIRECT MY GIFT TO:

Annual Programs Fund  Permanent Fund (World Fund)  
 PolioPlus  Permanent Fund (SHARE)  
 Other: \_\_\_\_\_  Permanent Fund  
(Other: \_\_\_\_\_)

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Postal Code

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
E-mail

\_\_\_\_\_  
Rotary Club

\_\_\_\_\_  
District

Please mail, fax, or e-mail this form to:

Gift Administration / FN120

The Rotary Foundation

One Rotary Center

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