



*Lessons in learning. Lessons for life.*

### **Gift of Appreciated Securities Form**

A great way to make a gift to Boston Partners in Education (Boston Partners) is through the transfer of appreciated publicly traded securities held for over one year. Upon transfer, you are entitled to a federal income tax deduction for the market value of the securities. In addition, neither you nor Boston Partners is taxable on the long term gain realized upon the sale of the stock.

For example, if you bought stock ten years ago for \$1,000 and it is now worth \$10,000, you may give it to Boston Partners and be entitled to a \$10,000 federal income tax deduction. You also avoid any tax on the \$9,000 gain that would be taxable if you had sold the stock and then gave the proceeds to Boston Partners.

The value of the deduction is generally limited to 30% of your adjusted gross income in the year of the gift, but any excess deduction may be carried over and used over the next five years.

If the securities have been owned for less than one year, the charitable tax deduction is based on your cost in purchasing the security, but again neither you nor Boston Partners is taxable on the gain.



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## Gift of Appreciated Securities Form

Please print, fill out, and fax or mail to:

Pamela Civins  
c/o Boston Partners in Education  
44 Farnsworth Street  
Boston, MA 02210  
Fax: (617)482-0617

### **Donor Information**

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
E-Mail \_\_\_\_\_ Phone \_\_\_\_\_

Check this box if you wish to make this donation anonymously.

### **Securities Gifted**

1. Number of Shares \_\_\_\_\_ Name of Security \_\_\_\_\_  
2. Number of Shares \_\_\_\_\_ Name of Security \_\_\_\_\_

Approximate Intended Date of Transfer \_\_\_\_\_  
Approximate Dollar Value of Gift \_\_\_\_\_

### **Transferring Broker**

Name \_\_\_\_\_  
Firm \_\_\_\_\_  
Telephone \_\_\_\_\_

*Boston Partners in Education has public charity, nontaxable, 501(c)(3) status in the United States. We rely on the annual support of many generous individuals, foundations, and corporations.*

### **Brokerage Information**

Fifth Third Bank  
DTC # 2116  
A/C Hemenway & Barnes LLP  
A/C # 010034079323  
FFC: Boston Partners in Education