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.
Gift of Appreciated Securities Form

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

Jim Laudisio  
c/o Boston Partners in Education  
44 Farnsworth St.  
Boston, MA 02210  
Fax: (617) 482-0617  
Email: jlaudisio@bostonpartners.org

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 __________________________
   Acquisition Date ______ Cost Basis $ __________________
2. Number of Shares ______ Name of Security __________________________
   Acquisition Date ______ Cost Basis $ __________________

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
State Street Bank & Trust Company  
Agent Bank No.: 62441  
DTC Participant #: 00987  
FFC ACC #: 95-117570  
FFC ACC Name: Boston Partners in Education Inc