



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.



WRITE

192 SOUTH STREET, SUITE 600
BOSTON, MA 02111



CONNECT

617.451.6145
BOSTONPARTNERS.ORG



Gift of Appreciated Securities Form

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

Jim Laudisio
c/o Boston Partners in Education
192 South Street, Suite 600
Boston, MA 02111
Email: jim_laudisio@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



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