



Gifts of Appreciated Securities

A great way to make a gift to Boston Partners in Education (BPIE) is through the donation of appreciated securities held for more than one year.

Appreciated securities are securities such as publicly traded stocks that have increased in value since they were purchased.

Upon transfer of appreciated securities to BPIE, you are entitled to a federal income tax deduction for the fair market value of the securities on the date of transfer. In addition, neither you nor BPIE is taxable on the capital gains realized upon the sale of the securities.

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

If the securities have been owned for less than one year, your charitable tax deduction is based on the lesser of their fair market value and what you paid for them.

The value of the tax deduction for a gift of appreciated securities is generally limited to 30% of your adjusted gross income in the year of the gift, per [IRS Publication 526](#). Please consult with your tax advisor to determine the best assets to donate and strategies for giving.

As a 501(c)(3) charitable organization, BPIE is qualified to receive tax-deductible contributions. Our tax ID is 04-2501341.

To make a gift of appreciated securities, please complete (or have your broker complete) the form on the following page. Alternatively, you may donate stock online via our page on [DonateStock](#).

Please note that while we have made every effort to ensure the accuracy of the information above, it is not intended as a substitute for professional legal, tax, or financial advice.



WRITE
192 SOUTH STREET, SUITE 600
BOSTON, MA 02111



CONNECT
617.451.6145
BOSTONPARTNERS.ORG



Gift of Appreciated Securities Form

Please complete and return to:

Boston Partners in Education, Attn: Jim Laudisio
192 South St. Ste. 600
Boston, MA 02111
Email: jim_laudisio@bostonpartners.org
Phone: (617) 344-9720

Donor Information

Name:

Address:

City:

State:

Zip:

Email:

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 on Transfer Date: \$

2. Number of Shares:

Name of Security:

Acquisition Date:

Cost Basis on Transfer Date: \$

3. Number of Shares:

Name of Security:

Acquisition Date:

Cost Basis on Transfer Date: \$

Approximate Intended Date of Transfer:

Approximate Dollar Value of Gift:

Transferring Broker

Name:

Firm:

Email:

Phone:

BPIE Brokerage Information

State Street Bank & Trust Company

Agent Bank No.: 62441

DTC Participant #: 0987

FFC ACC #: 95-117570

FFC ACC Name: Boston Partners in Education Inc



WRITE

192 SOUTH STREET, SUITE 600
BOSTON, MA 02111



CONNECT

617.451.6145
BOSTONPARTNERS.ORG