



Give Through Your Stock Investments

A tax-efficient way to support BRAC's innovative programs around the world

Giving through stock has become increasingly popular due to favorable tax rules for donors. This method of supporting BRAC allows you to donate through appreciated securities that have been held long-term (for at least one year and one day) and includes publicly traded securities, mutual funds, and Treasury bills and notes. Securities traded on public stock exchanges or within over-the-counter markets are the easiest to gift, requiring no appraisal regardless of the size of the donation.

How can this giving strategy work for you?

- Stock gifts allow you to give more with less - these donations avoid capital gains tax and allow you to take a charitable income tax deduction equal to the market value of your shares on the date of the gift.
- It is easy to measure your gift - the value is based on what the stock or other security is sold for on the day of the donation within the exchange.
- Your gift can remain anonymous, if you choose.

Ways to give through stock:

Electronic transfer by broker

Inform your broker that you want to gift common stock or mutual fund shares to BRAC USA. Your broker should then contact our team at legacy@bracusa.org to transmit the details of the gift and acquire BRAC USA's transfer instructions and necessary documents. The transfer will then be initiated by your broker to BRAC USA's brokerage account.

Electronic transfer by agent

Request a transfer form from your shareowner services representative and then contact our team to transmit the details of your gift and confirm BRAC USA's account information prior to submitting the required documents. Upon BRAC USA's receipt of the shareholder statement confirming the transfer, BRAC USA will work with our broker to deposit and sell the shares.

Transfer by certificate

Please contact our team for stock power and letter of intent forms.

Next steps:

- Seek the advice of your legal or financial advisor to determine if this giving technique is the right fit for you.
- Decide which method you would like to make gifts of appreciated securities to BRAC USA. Transfer instructions are on the following page.
- Contact BRAC USA's giving team at legacy@bracusa.org to let us know of your gift and make sure your goals are honored.



WE'RE HERE TO HELP!

If you are considering this type of giving, we would be happy to discuss how gifting appreciated securities can support BRAC USA and invest in the potential of the people we serve. Contact us at legacy@bracusa.org.

This information is meant to provide a general overview of this gift option and is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in any examples are for illustrative purposes only. References to tax rates include federal taxes only and are subject to change. State law may further impact your individual results



Give Through Your Stock Investments

A tax-efficient way to support BRAC's innovative programs around the world

BRAC USA Stock Transfer Information

If the shares are held at a securities firm or other brokerage account, please transfer to BRAC USA's account at Charles Schwab & Co, Inc.

Broker: Charles Schwab & Co, Inc.

Account Name: BRAC USA, Inc

**Depository Trust
Company Number:** 0164, Code 40

Account Number: 7628-2774

If the shares are in a mutual fund or are in physical possession, please contact BRAC USA to ensure that they can be accepted.

Contact: Whitney Reichenbacker, Finance and Administration Director, BRAC USA

Phone: +1 212 808 5615

**Federal Employee
Identification Number:** 20-8456741