

# GIFTS OF STOCK TO LEGAL AID OF NORTH CAROLINA

## **Benefit to You**

For tax purposes, if you itemize, you can deduct the full fair market value of the securities and avoid paying capital gains tax on appreciated securities.

## **Benefit to our Clients**

We can use your gift to provide much needed civil legal services to North Carolinians who cannot afford quality access to justice in a variety of civil legal areas that impact safety and stability.

## **Stock Transfer Instructions:**

1. Instruct your broker or commercial banker to transfer the shares directly into Legal Aid of North Carolina's broker account, via:

Financial Institution: **National Financial Services LLC**

Phone: (800) 752-7053

Depository Trust & Clearing (DTC) Number: **0226**

Receiving Account Number: **WA7181620**

FBO: **Legal Aid of North Carolina, Inc**

Donor Name: **Your First and Last Name**

Your shares will be transferred through National Financial Services into our Broker account at Truist Investment Services, where we can sell the shares with your gift proceeds becoming available in our regular operating bank account. *Your gift will be valued on the date it is deposited into our brokerage account.*

Mutual fund units cannot be electronically transferred via DTC. The method used to transfer mutual funds varies, depending on how the fund units are held, so please contact us at the email below for options.

2. In order to receive the proper tax valuation, please be sure to send an email to Missy Hatley, Director of Development, at [missyh@legalaidnc.org](mailto:missyh@legalaidnc.org) to share the name of the stock you are donating, and how many shares are being transferred to Legal Aid of North Carolina. We will then verify and confirm with a donation acknowledgment for your records.

If you encounter a question or issue working with your broker regarding this information, please call our development office at 919-436-2340 and we will be happy to help!

**THANK YOU FOR YOUR GENEROUS GIFT!**