

Instructions Making a Gift of Stock to



There may be tax advantages in donating appreciated stock. Please consult your tax professional to see how you might benefit.

An electronic transfer to the Maine Central Institute brokerage account is the most efficient and preferred method for making gifts of stock to the Founders Campaign.

1. **Before transferring your stock**, it is very important to **notify MCI** regarding **the number and name of the shares being transferred** to ensure that your name is directly associated with your gift when it arrives in the account. Please contact in advance of the transfer:

Sharon Savasuk, Advancement Office Manager

Telephone: 207- 487-5915 E-mail: ssavasuk@mci-school.org

2. To make a gift of securities to the Founders Campaign, instruct your broker to make an electronic transfer to:

UBS Financial Services, Inc.

Contact Name: Paula Raleigh

Telephone: 207-791-5539

Account name: Trustees of Maine Central Institute

Account #MH-25358-52 DTC #0221

3. On the date the transfer is complete your gift will be valued by taking the average of the high and low price of the shares on that date multiplied by the number of shares donated. For tax purposes the acknowledgment of your gift will contain the final dollar value of your gift. Changes in the value of shares after the transfer date do not affect the dollar value of your gift.

Please note that all donations of securities will be liquidated after delivery to MCI's account. MCI is a 501(c)(3) nonprofit organization. All gifts are tax deductible to the extent allowed by law.