



Friends School

BALTIMORE • 1784

Giving Appreciated Securities

You will receive full tax deduction for the market value of securities given. This avoids any capital gains tax you would incur in selling appreciated securities as long as they have been held for one year.

How to give securities held by your broker:

1. Instruct your broker in writing to transfer a specific gift amount to Friends School of Baltimore, including:
 - a. Your name & address
 - b. Stock type
 - c. Number of shares
 - d. Intended gift value
 - e. Your broker's contact information
2. Instruct broker to contact the Development Office upon arrival of your letter for specific DTC instructions.

FBS's Acct. # at Morgan Stanley

633-099-420

FSB's Contact:

Keith Collison, 410-736-5581

FSB's Federal Tax EID #:

52-0591602

DTC #

0015

3. Send a copy of your letter to the Development Office (address below).

How to give securities held in your possession:

1. Mail unendorsed certificates to FSB's Development Office (address below) with a short letter of intent.
2. Obtain a stock power from your broker with your signature guaranteed.
3. Under separate cover, mail the stock power to FSB with a copy of your original letter of intent.

Giving Securities while Retaining Life Income

You may also make a gift of securities through a trust arrangement and receive income during your lifetime or the lifetime of your designated beneficiary. Consult your tax and financial advisors to determine which plan is best for you.

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