



## 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 broker in writing to transfer a specific gift amount to Gilman School.
2. Instruct broker to contact the Advancement Office upon arrival of your letter for specific DTC instructions.

<b>Gilman School's Federal Tax ID #:</b>	<b>52-0591604</b>
<b>Gilman School's Acct. # at Fidelity:</b>	<b>668-116279</b>
<b>Fidelity/ NFS DTC #</b>	<b>0226</b>

### Gilman's Broker:

- Brian Vitrano, 410-537-5494, [bvitrano@brownadvisory.com](mailto:bvitrano@brownadvisory.com)
- Connor Eagleson, [reagleson@brownadvisory.com](mailto:reagleson@brownadvisory.com)

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

### How to give securities held in your possession:

1. Mail unendorsed certificates to Gilman's Advancement 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 Gilman 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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