

# THE FUND for VILLA

## STOCK/SECURITIES GIFT FORM

### Gifts of Stock / Appreciated Securities

Gifts of appreciated stock allow donors to support the school while taking advantage of additional tax benefits. Please consult with your financial advisor for more information about these benefits. To make a gift of stock, please refer to the instructions below:

### To make a gift of stock, please transfer securities directly to Villa Academy's account at:

UBS Financial Services

**DTC Number:** 0221

F.A.O. Villa Academy

A/C WI-68007-KD

**Tax ID:** 91-097-8575

**Contact:** Ken Powers or Dale Young at 206-628-6512

We recommend DTC transfers, which are quick and reliable.

Notify the Villa contact below, as well as UBS Financial Services, with the stock NAME and NUMBER of share(s) being gifted:

Kelly Brackett, Director of Development

**Phone:** 206-729-0219 x268

**Email:** [Kbrackett@thevilla.org](mailto:Kbrackett@thevilla.org)

### Important information for gifts of stock:

All securities **must** be transferred into Villa's name prior to being sold; otherwise, the donor will be responsible for paying capital gains tax on the appreciated asset(s). You or your Advisor must notify Villa and UBS Financial Services when you are making a transfer. Due to security regulations, there are no individual names associated with an account on a stock gift, therefore it is essential that you notify us so we may properly thank and credit you for your generous donation.

**Donor Name:** \_\_\_\_\_

**Name of Stock:** \_\_\_\_\_

**Number of Shares:** \_\_\_\_\_

**Broker's Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Planned Date of Gift:** \_\_\_\_\_