



## **Mountains to Sound Greenway Trust Gifts of Stock or Mutual Funds**

### **Donating Long-Term, Appreciated Stock or Other Securities**

The easiest way to give a gift of stock is through your broker. The Mountains to Sound Greenway Trust has a brokerage account at Charles Schwab. If you have an account with this institution, your broker may make an in-house transfer into our existing account. Instruct your stockbroker to make a direct electronic transfer of your stock to the Greenway Trust's account.

If you have a brokerage account at another institution, notify your stockbroker in writing that you wish to make a charitable gift of stock to Mountains to Sound Greenway Trust, providing the Charles Schwab account information below.

To acknowledge your gift for tax purposes, we need the following information **prior** to the transfer:

- Your name
- Number of shares
- Name of the stock or fund

### **Donating Depreciated Stock or Mutual Fund Shares**

If you own stock or mutual fund shares that have gone down in value, you can first sell the shares, then contribute the proceeds to Mountains to Sound Greenway Trust and claim a charitable gift deduction and a capital loss deduction to offset any capital gain you may have.

### **Mountains to Sound Greenway Contact Information**

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### **Charles Schwab Account Information**

Charles Schwab & Co, Inc.  
FFC: Mountains to Sound Greenway Tr  
Account # 8242-8796  
DTC # 0164, code 40

**The Mountains to Sound Greenway Trust is a 501(c)(3) non-profit organization, Tax ID # 91-1531234**