



## Give the gift of securities!

### Fed-Wired Money:

If you wish to make a cash contribution via Fed Wire, please provide the following information to your current account holder:

Wire to: Wells Fargo Bank MN, NA 6th St. and Marquette Ave., Minneapolis, MN 55479

ABA #: 121000248

FBO: American Enterprise Investment Services, Inc.

A/C#: 6886001293

For the Account of Ameriprise A/C: #63113762 7 133

F/F/C Client name: PAWS Animal Adoption Center

### Securities:

If you would like to transfer securities to P.A.W.S. electronically from your brokerage or advisory account, please provide the following information to your financial advisor:

That the gift is to be made via DTC free delivery as follows:

Account Name: P.A.W.S. Animal Adoption Center

Ameriprise Account Number: 63113762 7 133

Delivery to DTC Clearing 0756

Please provide the following information regarding the sending brokerage firm to both P.A.W.S. Animal Adoption Center as well as the receiving brokerage firm:

Name of Donor \_\_\_\_\_

Name of Stock \_\_\_\_\_ Number of Shares \_\_\_\_\_

Brokerage Firm or Bank \_\_\_\_\_ Date of Gift \_\_\_\_\_

Contact (Name of Broker) \_\_\_\_\_

If you have owned a stock for more than 12 months and it has appreciated in value during that time, you would incur a capital gains tax by selling it. However, if you give that stock to P.A.W.S. as a gift, you avoid the capital gains tax and also can claim an income tax deduction for the full fair market value of the gift up to an amount equal to 30% of your adjusted gross income. Any unused deduction may be carried forward for up to five years.

Contributions of appreciated securities you have held for less than 12 months are less advantageous from a tax standpoint as your deduction is limited to your cost basis in the securities. You may not claim any of the appreciation as a charitable deduction.

If a stock has lost value since you obtained it, there is generally no advantage in making a gift of it because you may not claim the capital loss for the decrease in value at the time you make your gift. Rather, you should sell the stock, claim the capital loss, and then contribute the cash proceeds, which will entitle you to an income tax charitable deduction.

The information contained here should not be used in any actual transaction without the advice and guidance of a professional Tax Adviser who is familiar with all the relevant facts.

Although the information contained here is presented in good faith and believed to be correct, it is General in nature and is not intended as tax advice. Furthermore, the information contained herein may not be applicable to or suitable for the individuals' specific circumstances or needs and may require consideration of other matters.

PAWS ANIMAL ADOPTION CENTER

123 John Street, Camden, Maine 04843

(207) 236-8702 • [www.PAWSadoption.org](http://www.PAWSadoption.org)