

Gifts of Securities/Stock Transfers

An increasing number of donors are making gifts of securities to Incarnate Word Academy, taking advantage of the tax benefits this type of giving allows. Giving appreciated stock to Incarnate Word Academy is a wonderful way to help us continue our mission. It allows Incarnate Word Academy to receive a larger gift than if it was sold by the donor and the proceeds donated to the school. In turn, the donor receives a greater tax deduction by giving the stock directly to Incarnate Word Academy and avoids capital gains tax.

Many people who own stock today have it held for them by their brokerage firm. To sell the securities held by your brokerage firm, an Electronic Transfer can be done to fulfill your wishes in selling or disposing of securities.

Directions for gifts of stock to Incarnate Word Academy, a 501(c) 3 not for profit organization:

1. Notify Incarnate Word Academy

Include the following information:

- Your name
- Stock name
- Number of shares
- Date they are going to be transferred
- Where to apply the donation

2. Contact your broker with the following information

Broker:

Wells Fargo Advisors, LLC
226 Crocker Park Blvd., Suite 200
Westlake, OH 44145

Contact:

Jacob Krecic
Managing Director - Investments
Tel 440-925-4330
Toll-free 800-262-6564
Fax 440-925-4353
Jacob.krecic@wellfargoadvisors.com

Account # will be provided upon request
Account Title: Incarnate Word Academy
DTC# 0141
Tax ID:34-1685003