

## Gifts of Appreciated Securities to the SCORE Foundation

Giving a charitable gift of appreciated securities enables you to take advantage of tax savings with minimum cost. The SCORE Foundation is exempt from Federal income tax under the Internal Revenue Code

501 (c) (3). Our tax exemption number is 52-1962712.

### **Instructions to Transfer Stock that your broker holds for you:**

1. Have your broker contact Mark Dobosz of the SCORE Foundation at 941-371-3107.
2. Your broker will be sent a Gift Authorization which contains the DTC number needed to make the transfer.

Please BancBank of America Investment  
deliver/wire Services, Inc.  
transfer the stock 1101 Wootton Parkway – 3<sup>rd</sup> Floor  
to: Rockville, MD 20852  
1/800-457-3317  
Account number **W13-130710**  
**DTC # 226**

3. The SCORE Foundation will notify our brokerage firm, Bank of America of the impending transfer.
4. The SCORE Foundation will furnish you with the value of your gift upon receipt of the stock by our brokerage firm.
5. The SCORE Foundation will send you an acknowledgement of your gift along with a receipt.

### **Instructions to Transfer Stock Certificates not held by a brokerage firm:**

1. Sign and complete a blank stock power and waiver provided by our brokerage firm, Bank of America. A copy of both forms can be obtained by calling Mark Dobosz at 941-371-3107; this should be mailed to the SCORE Foundation, Attention: Mark Dobosz – 4135 Centergate Boulevard, Sarasota, FL 34233. Be sure to have your signature guaranteed by your bank. You can

- obtain blank stock powers from your local bank or brokerage firm.
2. The stock certificates should be mailed separately from the stock power to the SCORE Foundation, Attention: Mark Dobosz – 4135 Centergate Boulevard, Sarasota, FL 34233. Together these two documents are negotiable. They are like endorsed checks and can be cashed by anyone. It is important to mail them separately. Due to the nature of the documents being mailed, we recommend that you send it via certified/registered/express mail.
  3. The SCORE Foundation will deliver these to our brokerage firm. The SCORE Foundation will furnish you with the value of your gift. The effective date of the gift for this method is the date of the postmark.
  4. The SCORE Foundation will send you an acknowledgement of your gift along with a receipt.

### **Instructions to Transfer Mutual Funds:**

1. Mutual funds take longer to transfer because they have to be re-registered. Very often it can take three weeks or more to transfer. Be sure to begin the process at least one month before the end of the charitable gift year in which you want to make your gift.
2. Have your broker call Mark Dobosz of the SCORE Foundation at 941-371-3107 with these pieces of information:
  - a. Your name and address
  - b. Your broker's name, telephone number and fax number.
  - c. The name of your mutual fund and the number of shares you wish to donate.
  - d. Your bank or broker will be given delivery instructions.
  - e. You will be asked to sign a letter detailing the number of shares. Be sure to have all share owners sign the letter and be sure to have your bank guarantee your signature.

