



## Gifts of Securities

A gift of appreciated securities may offer significant income tax advantages to the donor while providing generous support to Greenhill School. To make a gift of securities to the School, please follow the instructions below:

### Notify Greenhill

To ensure proper acknowledgement of your gift of securities, please notify Greenhill School of your intent to give an appreciated security in advance. Contact Kristy Joiner at (972) 628-5646 or [joinerk@greenhill.org](mailto:joinerk@greenhill.org) and provide the following information:

- Your name(s)
- Your broker's name and telephone number (if applicable)
- Description of the securities
- Number of shares
- Gift designation (e.g. Greenhill Fund, Great Expectations Campaign, etc.)

### Donating Securities Held in a Brokerage or Bank Account

Please contact your bank or brokerage firm and request an electronic transfer of securities to Greenhill School by writing a *Letter of Authorization*. This letter should include the name of the security and number of shares to be transferred, as well as the following DTC transfer instructions:

Transfer to: DTC #0725  
For further credit to: Greenhill School  
Account #27055739

Fax a copy of this request to Kristy Joiner at Greenhill School (Fax (972) 404-8217) and Aimee Zedlitz at Raymond James (Fax (214) 691-5588) or [aimee.zedlitz@raymondjames.com](mailto:aimee.zedlitz@raymondjames.com).

## **Donating Securities Held in Certificate Form**

Please mail (certified or registered mail recommended) or hand-deliver the stock certificate(s) and a signed (but *not* filled-out) Stock or Bond Power\* to the following address:

Raymond James  
Attention: Aimee Zedlitz  
5956 Sherry Lane, Suite 1900  
Dallas, TX 75225  
Phone: (214) 365-5570 or (800) 653-3426

## **Determining the Value of the Gift**

In addition to avoiding capital gains tax, a charitable gift of securities held for more than one year entitles the donor to an income tax deduction equal to the value of the security at the time it is given. IRS regulations state that the value of the gift for income tax purposes is determined on the date the gift is completed and is equal to the mean of the high and low of the values traded on that date. When mailed, the gift is complete when it is postmarked. When hand-delivered, the gift is complete when received by Raymond James. When transferred electronically, the gift is complete when it arrives into Greenhill's brokerage account.

Greenhill will send you an acknowledgement letter that will specify the date the stock gift was completed and the amount of the contribution to the specified fund. Please consult with your financial or tax advisor for tax guidance prior to giving a gift of securities to Greenhill School.

\*To obtain a blank Stock or Bond Power or for further details about making a gift of securities, please contact Aimee Zedlitz with Raymond James at (214) 365-5570.