



The Episcopal School of Dallas

Gifts of Securities

Giving long-term appreciated stock or mutual fund shares offers two-fold tax savings:

- You avoid paying any capital gains tax on the increase in value of your stock.
- You receive an income tax deduction for the full fair-market value of the stock on the date of the gift (regardless of what ESD nets when it sells the stock).
- You may deduct up to 30 percent of your adjusted gross income with an additional five-year carry forward. The carry forward provision allows you to use the deduction in future years, spreading your deduction over six years potentially.

Other benefits of making gifts or pledge payments with appreciated securities:

- Such a gift may not impact your income stream as much as a gift of cash.
- Using securities may allow you to maximize the gift you wish to make.
- The gift process (electronic transfer in most cases) can be handled easily by your broker and the ESD Office of Advancement.

Important: Before transferring your gift, please contact The Episcopal School of Dallas:

Gabrielle Griffin, Advancement Services Manager, 214.353.5860, griffing@esdallas.org

and provide the following information:

- Your name
- Broker's name (individual and company) and telephone number
- Description of security issued and number of shares
- Expected date of transfer
- Gift designation (e.g. The ESD Fund)

It is important that you contact the Office of Advancement before donating securities so that we can properly credit your gift.

Electronic Transfer of Securities:

To transfer stock electronically, please give your broker or custodian the following information:

Gifts of DTC eligible securities:

TD Ameritrade
DTC #0188 FBO Episcopal School of Dallas
Account# 422917895

Thank you for your generosity. We will be in touch with you as soon as we receive the transfer.