



## STOCKS TAKE FLIGHT

### HOW TO GIVE THE GIFT OF STOCK

There are many reasons to give back to your community, and help make medical care more accessible to families in need. Here are some great reasons why giving stock is a successful financial planning strategy:

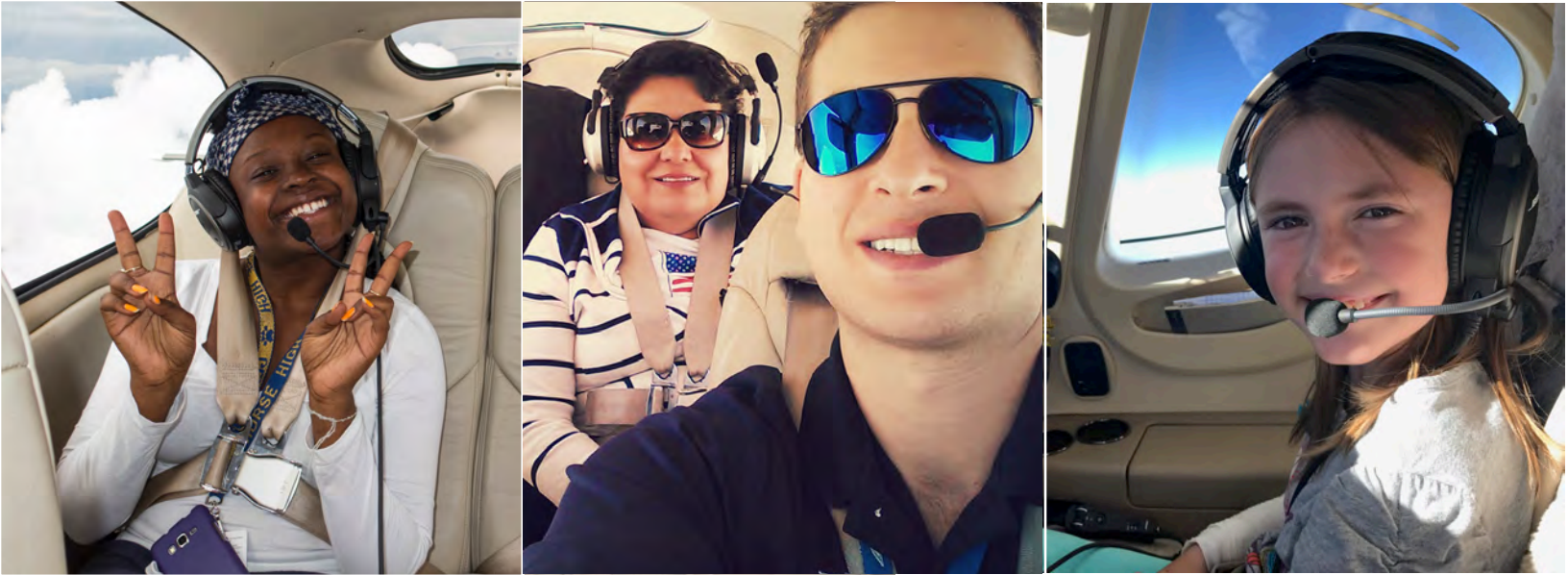
- Share your financial success with those less fortunate
- Become part of a legacy by donating to a worthy non-profit
- Optimize your charitable giving and realize notable tax advantages. Neither the charity nor the donor pay a capital gains tax on appreciate stock; however, the donor can deduct the full value of appreciate stock.

We are open to any kind of stock gift you would like to donate! Additionally, we are actively seeking the following positions:

AMAZON  
APPLE  
NETFLIX  
AMGEN  
ACTIVISION  
DISNEY  
CON EDISON  
MATTEL  
GOOGLE  
MICROSOFT

STARBUCKS  
BIOGEN  
S&P 500  
COCA COLA  
FACEBOOK  
HP  
BROADCOM  
FIRST SOLAR  
J&J  
SNAP

GE  
BERKSHIRE  
WELLS FARGO  
UPS  
DELTA AIRLINES  
ADOBE  
AMEX  
TARGET  
BOEING  
EXXON



If you have questions about how you can give the gift of stock, please refer to the steps outlined in the two scenarios below:

### **YOU HAVE A FINANCIAL ADVISOR**

STEP 1. ASK YOUR ADVISOR IF YOU HAVE ANY “MISSING BASIS” STOCK. THESE ARE POSITIONS WHERE YOU DO NOT HAVE A RECORD OF THE COST OF THE STOCK. IF YOU WERE TO SELL THESE SECURITIES, YOU WILL PAY CAPITAL GAINS TAX ON THE ENTIRE VALUE. BY DONATING THESE SHARES YOU AVOID THIS HIGH LEVEL OF TAXATION.

STEP 2. ASK YOUR ADVISOR TO SEND YOU A LIST OF YOUR STOCKS HELD GREATER THAN ONE YEAR, ACCORDING TO THE HIGHEST PERCENTAGE GAINERS.

STEP 3. DETERMINE THE VALUE OF YOUR CONTRIBUTION AND IDENTIFY THE SECURITIES TO BE TRANSFERRED.

### **YOU MANAGE YOUR OWN ACCOUNT**

STEP 1. REVIEW YOUR PORTFOLIO FOR MISSING BASIS STOCK. THESE ARE POSITIONS WHERE YOU DO NOT HAVE A RECORD OF THE COST OF THE STOCK. IF YOU WERE TO SELL THESE SECURITIES, YOU WILL PAY CAPITAL GAINS TAX ON THE ENTIRE VALUE. BY DONATING THESE SHARES YOU AVOID THIS HIGH LEVEL OF TAXATION.

STEP 2. SORT YOUR ACCOUNT ACCORDING TO THE HIGHEST PERCENTAGE GAINERS. LOG IN TO YOUR ACCOUNT AND GO TO YOUR “HOLDINGS” OR “POSITIONS” PAGE. THERE SHOULD BE A COLUMN FOR THE % GAIN-LOSS OF EACH POSITION.

STEP 3. DETERMINE THE VALUE OF YOUR CONTRIBUTION AND SELECT THE SECURITIES TO BE TRANSFERRED.

**EMAIL YOUR BROKERAGE FIRM WITH THE FOLLOWING TRANSFER INSTRUCTIONS**

UBS Financial Services  
DTC 0221  
FBO Y621788/Angel Flight

Angel Flight West  
3161 Donald Douglas Loop S  
Santa Monica, CA 90405 310.390.2958



## **GIFT OF SECURITIES/STOCK**

Thank you for your interest in making a charitable gift to Angel Flight West in the form of a Securities/Stock Transfer. The information below along with our Tax ID/EIN # (95-3956297), is provided to assist you in your transfer.

### **DTC instructions:**

DTC 0221  
FBO Angel Flight West  
Y6 21788

### **Cash:**

Bank: UBS AG  
ABA: 026007993  
Acct: UBS Financial  
A/C: 101-WA-258640-000  
FFC: Angel Flight West  
A/C: Y6 21788

### **UBS AG Address**

UBS AG  
677 Washington Boulevard  
Stamford, CT 06901  
203-719-3000

### **Kelly Chavira**

Senior Client Service Associate  
The Spinner Group  
310-734-3883 Direct Line  
855-208-7969 Fax

<http://financialservicesinc.ubs.com/team/spinner/>

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To ensure that your gift is processed accurately, please complete the information below and email to [carolynj@angelflightwest.org](mailto:carolynj@angelflightwest.org) or fax 310-397-9636. This form will notify Angel Flight West of the impending gift.

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**Donor & Securities Information:**

Name & Type of Securities (e.g.: DELL common stock)

\_\_\_\_\_                      \_\_\_\_\_                      \_\_\_/\_\_\_/\_\_\_  
Security Symbol                      # of Shares                      Transfer Date

Donor Name (Individual, Corporation, Foundation) \_\_\_\_\_

Donor Street Address \_\_\_\_\_

Donor City / State / Zip \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Broker Name \_\_\_\_\_

Broker Company / City / State \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Donor Information: (to be used only if a question arises in the donation process)

Telephone (    ) \_\_\_\_\_ - \_\_\_\_\_ Email Address \_\_\_\_\_

Donor Signature \_\_\_\_\_ Date Signed \_\_\_\_\_

Donor Signature \_\_\_\_\_ Date Signed \_\_\_\_\_

*Please consult with your tax advisor before making a charitable donation to any charity. You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.*

*Thank you again for considering AFW as the recipient of your charitable gift.*

