



# Give the Gift of Stock

Donating appreciated stocks, bonds, or mutual funds is an impactful way to help patients access essential care through gifted flights while saving on taxes.





## An Impactful Way to Give

There are many reasons to give back to your community and help make medical care more accessible to families in need. You donate your appreciated stock, mutual funds, or bonds to Angel Flight West. We sell your gift and use the proceeds for life-changing work.

### No Capital Gains Tax

Neither the charity nor the donor pay a capital gains tax on appreciated stock; however, the donor may be eligible to deduct the full value of appreciated stock.

### Reduce Future Capital Gains

Consider donating stock, including stock with a low basis, and utilize cash to replace the position.

### Become Part of a Legacy

Become part of a legacy by donating to a worthy cause. Each year, Angel Flight West coordinates thousands of life-changing flights to connect patients in need of health and hope.





# Prepare to Contribute

## ➤ Step 1

Ask your financial advisor 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

Your financial advisor can sort your account according to the highest percentage gainers.

## ➤ Step 3

Determine the value of your contribution and identify the securities to be transferred.

*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. 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.*



# Transfer Your 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 is provided to assist you in your transfer. Email your brokerage firm with the following information:

## Organization Contact / Tax Info:

**ANGEL FLIGHT WEST**  
3161 Donald Douglas Loop S.  
Santa Monica, CA 90405

**Tax ID/EIN:** 95-3956297

donate@angelflightwest.org |  
(310) 390-2958

## Organization Bank / Brokerage Firm:

**UBS Financial Services**  
DTC #: 0221  
Account Name: Angel Flight  
Account Number: Y621788

**Kelly Chavira**  
Senior Client Service Associate  
The Spinner Group  
(310) 734-3883

## Gift of Securities / Stock:

**DTC Instructions**  
*See info listed under UBS Financial Services*

**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 / Contact:

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

Email [donate@angelflightwest.org](mailto:donate@angelflightwest.org)  
to notify AFW of your gift

