

## Giving Stocks and Appreciated Assets

### What Are Gifts of Stock or Appreciated Assets?

A **gift of stock or appreciated assets**—such as publicly traded securities, mutual fund shares, or other investments—is a tax-efficient way to support a nonprofit.

### Advantages of Giving Stock:

By donating the asset directly to the nonprofit:

- You avoid paying capital gains taxes.
- You receive a charitable deduction for the full fair market value.
- You maximize the impact of your giving without reducing cash flow.

### How does Giving Stock Support the Poe Center?

Giving stock or appreciated assets:

- Allows the Poe Center to receive the full value of your contribution.
- Supports our long-term programs and initiatives that make a real impact.

### How to Give Stock or Appreciated Assets:

1. Contact your financial advisor or broker to initiate a stock or asset transfer.
2. Provide the nonprofit's brokerage information:
  - a. Receiving Brokerage Firm: **Raymond James**
  - b. Account Name: **Alice Aycock Poe Center for Health Education**
  - c. Account Number: **587P3065**
  - d. DTC Number: **0725**
3. Notify the Poe Center with the details of your gift so it can be acknowledged properly. Please email Development/ Data Senior Specialist, Jacqueline Kussin at [j.kussin@poehealth.org](mailto:j.kussin@poehealth.org).

#### Questions?

Email Development Senior Director, Kim Whitley at [k.whitley@poehealth.org](mailto:k.whitley@poehealth.org).