

# GIFTS OF CASH and GIFTS OF STOCKS, BONDS, MUTUAL FUNDS OR OTHER APPRECIATED SECURITIES



## CHECKS

**Make checks payable to the order of:**  
**Mail checks to:**

Big Brothers Big Sisters of the Lowcountry  
4151 Spruill Avenue, Suite 140  
North Charleston, SC 29405

As a Big Brothers Big Sisters of the Lowcountry donor, you are entitled to take a charitable deduction for the full fair-market value of appreciated securities held longer than one year, and you usually avoid paying the capital gains tax that would be due if you sold the securities.

Should you have questions, please contact Merridith Crowe at 843.401.3556 ext. 700.

## ONLINE GIVING

To make secure one-time or schedule monthly online donations via credit card or ACH, please visit:  
[www.bbbslowcountry.org/donate](http://www.bbbslowcountry.org/donate)

Should you have questions, please contact Merridith Crowe at [merridith@bbbslowcountry.org](mailto:merridith@bbbslowcountry.org) or 843.401.3556 ext. 700.

## STOCKS, BONDS, OR APPRECIATED SECURITIES

### **Donating Stock or Bonds Held by a Bank or Broker**

If your equities are currently held at a bank or in a brokerage account, simply send a letter of instruction to your broker or banker with a full description of the securities and your gift's intended purpose. Securities can be sent electronically using the following transmittal instructions:

Morgan Stanley  
Big Brothers Big Sisters of America  
Account #574711913  
DTC #0015

**\*\*\*\*Please Note the Purpose As:** Big Brothers Big Sisters of the Lowcountry

Before transferring, please contact Merridith Crowe at (843) 480-4776 or via email at [merridith@bbbslowcountry.org](mailto:merridith@bbbslowcountry.org). While gifts will route through Big Brothers Big Sisters of America, they will be directed to support local activities. For more information, please contact Morgan Stanley at (888) 454-0555.

## Donating Stock Certificates You Hold



- Send the unsigned certificates by certified mail to the attention of  
**Big Brothers Big Sisters of America**  
*Attention: Individual Giving*  
2502 N. Rocky Point Drive, Suite 550, Tampa, FL 33607
- Copy and send one blank stock Power of Attorney for each company whose stock you are transferring. Only the signature line should be filled in, with the signature(s) matching the name(s) that appear on the face of the certificates. Include both names if the stock is jointly owned.
- The Power of Attorney must be notarized.  
Send the certificates and stock powers in separate envelopes. Send the signed stock power in one and the stock certificate(s) in the other with a letter (also signed by the owner(s) of the stock) stating that the stock is being donated to Big Brothers Big Sisters of America.
- **Note the purpose of the gift is for Big Brothers Big Sisters of the Lowcountry.**

## Effective Date and Value of Your Gift

Your gift of stock or publicly traded securities will be valued based on the mean market price of the securities on the gift date. We will provide you with a receipt for your tax records. Big Brothers Big Sisters determines your gift date according to the following guidelines:

- By mail, it is the later of the postmark dates of your separately mailed stock certificates and stock powers.
- By electronic transfer, it is the date that the securities enter Big Brothers Big Sisters' account.
- By hand, it is the date that a Big Brothers Big Sisters' employee receives the stock certificates and stock powers of attorney.
- By reregistering securities in Big Brothers Big Sisters' name yourself, it is the date on the new certificates (this method takes the longest).

Should you have questions, please contact Merridith Crowe at [merridith@bbbslowcountry.org](mailto:merridith@bbbslowcountry.org) or 843.401.3556 ext. 700.

**Big Brothers Big Sisters of the Lowcountry's (BBBSL) is a registered 501(c)(3) nonprofit organization in good standing and its EIN is 83-3554712.**