



# Fresh Start Scholarship Foundation, Inc.

*Established by Wilmington Women in Business*

P. O. Box 7784, Wilmington, DE 19803

Tax ID# 51-0378642

## Stock Donation Instructions

*Since you plan to make a donation to a qualified charitable organization and donations may be deducted on your federal income tax return as an itemized deduction, you should consider donating appreciated stock from your portfolio instead of cash. This typically works best for folks whose marginal tax bracket is 15 percent or higher and who claim itemized deductions. Only stocks which have been held longer than one year and have long term capital gains should be considered. The tax benefits: deducting the full amount of the value of the appreciated stock and avoiding the unrealized capital gains which would otherwise be taxed.*

1. Select shares of stock you wish to transfer to Fresh Start Scholarship Foundation.
2. Complete a **letter of authorization** to transfer the stock. See suggested format below:

*Date*

*Account Executive Name*

*Your Brokerage Firm*

*Address of Firm*

*Ref: Your account number at the brokerage firm*

*I would like to gift stock from my above-referenced account as follows:*

<u>Stock name</u>	<u>Stock symbol</u>	<u># Shares</u>	<u>Estimated current value</u>
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*Please transfer shares to:*      *Scottrade, Inc.*  
*DTC #0705*  
*Account #33369275*  
*Fresh Start Scholarship Foundation, Inc.*

*Please provide me with a report showing high and low values of the donated stock on the day it transferred to Fresh Start for tax purposes.*

*Sincerely,*

*(Print donor's name)*

3. Please be sure to send a copy of your letter to:

Fresh Start Scholarship Foundation, Inc.

P. O. Box 7784

Wilmington, DE 19803

Thank you for considering a donation of appreciated stock!!

Information for this page provided by:

Fred Dawson

Bassett, Dawson & Foy, Inc.