



THE ERNEST BROOKS FOUNDATION

Gifts of Securities

When you make a gift of securities you help the Ernest Brooks Foundation and could receive a double tax benefit—a charitable deduction and avoidance of a capital gains tax.

- You may be able to take a tax deduction for the full, fair-market value of your stock or other securities that have increased in value (if you have owned them for at least 12 months)
- You pay no capital gains on any appreciated assets that contribute.
- You have the satisfaction of supporting the Ernest Brooks Foundation in a way that benefits you as well—and you may even be able to increase the amount of your gift because of its decreased cost to you.

To Make a Gift of Securities

Simply contact your financial institution and request the shares to be transferred to the Ernest Brooks Foundation account at TD Ameritrade.

You will need the following information:

EBF's Broker: TD Ameritrade

DTC# 0188

Account Name: Ernest Brooks Foundation

Account: 495738933

EBF Tax ID: 83-0894477

Please notify Tom Ligare so we can promptly acknowledge your gift:
tom.ligare@ernestbrooksfoundation.org
(805) 689-3483

In accordance with IRS Guidelines, the date of your gift will be the date the securities depart your account at your financial institution. For crediting purposes, the value is determined as the average high and low listings for the stock on that date.

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