# Amplify Your Impact Giving Appreciated Stock



Do you own stock that has increased in value? Have you owned this stock for more than a year?

If you answered "yes" to both questions, we have good news for you!

You can amplify your impact by donating appreciated stock to PBS KVIE. Many station supporters find that giving stock actually helps them do more than what's possible when giving cash. By joining these thoughtful investors, you too can yield high returns for early childhood education, the arts, and culture all across our beautiful region.

#### **Tax Savings**

There's more! You can enjoy a **double tax benefit** when you donate appreciated stock. You may claim a generous **tax deduction** for what the stock is worth today as opposed to what it cost you many years ago. You will also avoid paying **capital gains tax** on the transfer of the stock. This would not be the case should you decide to first sell the stock and then donate the proceeds.

#### **How to Give**

Giving stock to the station is simple. By working with your broker, you can donate stock electronically or by registered mail. It's also possible to name the station as a beneficiary of your stock account(s) – a popular option for our supporters who desire more flexibility.

No matter if you decide to give now or later, a gift of appreciated stock can help you amplify your impact and create meaningful change close to home.

#### We're Here to Help

If you and your broker need more information about donating stock, bonds, mutual funds, and other investments, please contact Colleen Schulman at 916-641-3595 or cschulman@kvie.org.



## PBS KVIE Stock Transfer Instructions

### You can make your gift of appreciated stock by completing three simple steps:

#### Step 1 – Initiate the Gift

The first step is to notify your broker of your desire to make a gift of appreciated stock. You can then work with your advisor to select the stock that will be transferred to the station. Your selection should, of course, align with your charitable and financial goals.

#### Step 2 – Send the Stock

#### Sending Electronically:

Please deliver by DTC to: KVIE. INC.

c/o Morgan Stanley

400 Capitol Mall, Suite 1900 Sacramento, CA 95814

DTC: 0015

Account: 102-109807

#### Sending by Registered Mail:

If sending by registered mail, you should send your unendorsed certificate(s) with a Stock Power Form, and a Stock Waiver Form in separate envelopes, to:

PBS KVIE

Attn: Gift Processing

2030 W. El Camino Avenue Sacramento, CA 95833-1866

#### Step 3 – Notify Us

To ensure your gift is processed in a timely manner, it's important that we know your stock gift is on the way. Please contact Colleen Schulman at 916-641-3595 or cschulman@kvie.org.

**Please Note**: For tax purposes, the Gift Date is recognized as the date the shares enter PBS KVIE's clearing account at Morgan Stanley or the date the stock is sent by registered mail. Your gift will be valued based on the average price (the mean between the highest and lowest selling prices) of the stock on the date of the gift.