



# Leave A Legacy: Appreciated Securities

If you would like to support **Ronald McDonald House Charities of Maine** with a tax-smart donation this year, a gift of appreciated stocks, bonds or other marketable securities that you have held for more than one year may be the right gift for you.

*Alicia Milne*

Development Director  
(207)780-6282 ext. 331  
development@rmhcmaine.org

250 Brackett Street  
Portland, Maine 04102

654 State Street  
Bangor, Maine 04401

Note: This information is not intended as legal or tax advice.

To ensure the best match for your individual goals and charitable vision, please consult with an attorney or professional advisor.

## YOUR BENEFITS

When making a gift of appreciated securities owned for more than one year, you will receive a double tax benefit:

- 1) You are entitled to a federal income tax deduction based on the current fair market value of the securities, regardless of their original cost.
- 2) You will be exempt from paying capital gains taxes on any increase in the value of the securities since you acquired them — taxes you would pay if you had otherwise sold them.

## STEPS TO TAKE

- 1) If you have the physical securities, either hand deliver them to us or mail us the stocks and stock power separately.
- 2) If you don't have possession of the physical securities, instruct your broker to electronically transfer your intended shares and notify **Alicia Milne** once the transfer is complete to ensure we correctly identify your gift.

**To initiate this gift, please contact Alicia for our DTC and Account Number.**

### How It Works

