



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.

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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 **Sterlynn Marx** 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

