



GIFTS OF STOCK

Your broker can assist you in making a gift of stock via a direct transfer to Lancaster Country Day School. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide greater tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock on the day that it is transferred, and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save by not incurring brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a gift by donating stock, please note the following:

Brokerage House: Merrill Lynch

Account Number: 807-04351

DTC Number: 8862

Merrill Lynch contact: Kelly Beitzel, Registered Client Associate
Telephone number: 717-295-5603 - Direct

Please inform our Development Department of stock transfers so that we can properly acknowledge your gift by emailing development@lancastercountryday.org or calling (717) 397-8126.