



Gifts of Stock or Appreciated Securities

Gifts of stock or appreciated securities are easy to make and may offer you and your family significant tax advantages. You receive a full, fair-market value tax deduction, and you avoid paying capital gain taxes on the appreciated value.

Simply contact your broker to determine which stocks and the number of shares to donate.

The value of your gift for tax purposes is the mean value of the securities on the date that the shares leave your brokerage account. An official tax receipt will be mailed to the donor after Germantown Academy receives the stock gift.

To ensure that you are properly credited for your gift, before transferring any stocks, please notify Meg Peake, Director of Annual Giving, at meg.peake@germantownacademy.org or 267-405-7503.

Information to Share with Germantown Academy:

- Donor's name
- Stock name and symbol
- Number of shares being transferred
- How the gift should be applied (for example: Annual Giving, a particular Endowment fund, Capital project, etc.)

Information to Share with your Broker:

GA's Stock Transfer Information

Muriel Siebert & Co., Inc.
601 Dresher Rd Suite 302
Horsham, PA 19044

DTC #0226
For Germantown Academy
Account #TSP071943
Attention: Gus Langford
800-545-7773, ext. 3823

Please Note: If you are interested in making a gift of *closely held securities* please contact the Office of Institutional Advancement directly, prior to initiating any transfers, as these gifts are contingent on approval.

If you have any additional questions, please contact Director of Annual Giving Meg Peake
(meg.peake@germantownacademy.org or 267-405-7503)