

# Gifts of stock or mutual funds



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## Contributing appreciated securities to Trust for Public Land

Gifts of long-term appreciated stock or mutual fund shares are an easy way to make a lasting contribution to Trust for Public Land. Benefits include:

- Income tax savings—For securities you have owned for more than one year, you can take an immediate income tax deduction.
- Capital gain tax savings—Avoid capital gain taxes you would have incurred if you had sold the stock or mutual fund shares.
- Conservation support—Provide crucial support to Trust for Public Land at a lower cost than if you had made a gift of cash.

## How to make a gift of long-term stock or mutual fund shares

- **Notify Trust for Public Land**

To help us ensure your gift of stock or mutual funds is received and acknowledged for tax purposes, you or your broker should notify us before sending or transferring shares. Contact information for Trust for Public Land's Donor Outreach is provided on page two.

Please include the following information in your notification to Trust for Public Land:

- Your name
- Number of shares
- Name of stock or mutual fund
- Trust for Public Land project/program the stock gift is intended to support (if applicable)

Your gift to "Where It's Needed Most" gives us the flexibility to advance our work in communities where parks and public lands are needed most.

- **Transfer the shares**

The easiest way to give a gift of stock is through your broker. Trust for Public Land has a brokerage account with Morgan Stanley. Notify your stockbroker in writing that you wish to make a charitable gift of stock to Trust for Public Land, providing your broker with the Morgan Stanley account information listed on page two. We've included a sample stock transfer instruction letter for your broker on page three. If your own account is with Morgan Stanley, your broker may make an in-house transfer to Trust for Public Land's account.

## Donating stock certificates

If your stock or mutual fund shares are in certificate form, or if your broker prefers to send the actual stock certificates, please send the unendorsed stock certificates by registered mail. In a separate envelope, send a signed stock power for each certificate with the signature guaranteed by a bank or your authorized broker. Stock power forms are available from Trust for Public Land.

## Gifts of insider or restricted stock, stock options, or other appreciated property

For more information, including questions regarding gifts of insider or restricted stock, stock options, or other appreciated property, contact Trust for Public Land's Donor Outreach.

Please contact us directly for additional information if your donation is being made to fund charitable gift annuities, charitable trusts, or pooled income fund gifts.

### TRUST FOR PUBLIC LAND ACCOUNTS AND CONTACT INFORMATION

#### Trust for Public Land contact information:

**Donor Outreach**  
**Trust for Public Land**  
PO BOX 889336  
Los Angeles, CA 90088-9336  
**t:** 1.800.714.5263  
**e:** donor.outreach@tpl.org

#### Office of Planned Giving

**t:** 202.856.3748  
**e:** plannedgiving@tpl.org  
**w:** tpl.planmygift.org

#### Morgan Stanley account information:

**Morgan Stanley**  
DTC # 0015  
**Account Name:**  
Trust for Public Land  
**Account #** 125-150565-415

#### Prior to transfer, notify Trust for Public Land with the following information:

- Your name
- Number of shares
- Name of stock or mutual fund
- Trust for Public Land project/program the stock gift is intended to support (if applicable)

**TRUST FOR PUBLIC LAND'S FEDERAL TAX ID # 23-7222333**

# Stock Transfer Instruction Letter

Date:

Stockbroker:

Brokerage firm:

Address:

Regarding: Transfer request to Trust for Public Land

Name of stock owner/account:

Registration:

Account #:

Dear Broker Representative/To Whom It May Concern:

Please accept this letter as authorization to transfer from the shareholdings recorded under account number \_\_\_\_\_ to "The Trust for Public Land," via our brokerage account, a gift of \_\_\_\_\_ shares of \_\_\_\_\_ stock [ticker symbol \_\_\_\_\_ ].

Please do not sell or redeem these units, as doing so may result in negative tax consequences. Before transferring, please first contact Trust for Public Land.

Sincerely,

## Trust for Public Land contact information:

### Donor Outreach

#### Trust for Public Land

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Los Angeles, CA 90088-9336

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