

Gifts of Stock, Bonds, or Mutual Funds

- ✓ **Support CPI's mission**
- ✓ **Take a tax deduction in the current year**
- ✓ **Maximize the value of your donation by avoiding capital gains when transferring your securities**

Make a bigger impact by donating securities, including stocks, bonds, and mutual funds, directly to a not-for-profit organization.

This is a *better* option than donating cash or selling your appreciated securities and then contributing the after-tax proceeds. Why? You automatically increase the value of your gift and take a tax deduction.

How does it work?

It's simple and easy. When you donate stock to a not-for-profit organization, you'll generally take a tax deduction for the full fair market value. Assuming security appreciation over time, this is greater than a tax deduction for your cost basis. Also, because you are donating stock, the value of your contribution increases since you aren't donating cash proceeds that have been lowered by capital gains taxes.

Would you prefer to donate bonds or mutual funds? The same benefits apply.

What are next steps?

Notify the Center for Public Integrity.

We ask that you or your broker notify us prior to sending or transferring shares. This will help ensure that your gift is handled properly and acknowledged for tax purposes.

Please include the following information in your notification to us:

- Your name
- Number of shares
- Name of stock or mutual fund
- Expected date of transfer and estimated value

Donors can also use gifts of securities to endow their annual gift or establish a planned gift such as a CPI gift annuity.

Transfer the shares electronically.

The easiest way to give a gift of stock is through your broker. CPI has a brokerage account at Stifel, Nicolaus, and Company, Inc. Please notify your broker in writing that you wish to make a charitable gift to us and provide your broker with page two of this document.

If your account is with Stifel, your broker may make an in-house transfer.

Donating Stock Certificates.

If your stock or mutual fund shares are in certificate form, or if your broker prefers to send the physical 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.

Delivery Instructions

All deliveries MUST reference the Center for Public Integrity and Stifel account number

Donating Cash:

Eagle Bank
7815 Woodmont Avenue
Bethesda, MD 20814

Account Name: Center for Public Integrity
ABA/Routing Number: 055003298
Account Number: 0200309250

Donating Stock:

Stifel DTCC New Jersey (DTC 0793)
570 Washington Blvd.
Attn: Central Delivery, 5th Floor
Jersey City, NJ 07310

Account Name: Center for Public Integrity
End Stifel Account Number: 4699-9823