



Making a Gift of Stock to The Immigrant Welcome Center

Please call Lisa Clark at 463-777-8049 to notify us of your plans to make a gift of stock.

Gifts of Securities:

- Are simple to donate and may provide favorable tax benefits. Appreciated securities, held for more than one year, may be deducted from taxable income without paying a capital gains tax on the appreciated portion of the gift. Please consult your tax advisor for more information regarding your specific tax situation.
- Are accepted by Immigrant Welcome Center, a 501 (c)(3) organization, and are considered for use in the general fund of the organization unless otherwise designated.
- Are credited on the date of transfer to IWC and are valued at the mean of the high and low quoted sales price on that day. Stock may be donated by electronic transfer Depository Trust Company (DTC) of the shares between your broker and IWC's broker.

Broker Information:

Broker: JP Morgan Securities LLC
Contact person: Michael Matchett, Michael.Matchett@jpmorgan.com, 317-249-9058
Account Name: Immigrant Welcome Center, Inc.
Account #: 757-06237
DTC #: 0352
Tax ID #: 20-3222424

Donor Information: *(required)*

Name of stock donor: _____

Description of stock being transferred: _____

For Recognition:

It is important for us to know the identity of the donors of all securities gifts in order to give prompt and accurate credit for gifts received. Particularly in the case of an electronic transfer, it is often very difficult to obtain this information after the transaction is processed. Therefore, in addition to instructing your broker to include your name and address in the DTC transfer instructions, please provide us with the following:

Name to be recognized: _____

Address: _____

For more information contact Lisa Clark, Fundraising & Marketing Specialist at IWC:

Phone: 463-777-8049 Email: lclark@immigrantwelcomecenter.org