SMHSF Securities Donation Form

Donate Securities

Gifts of stock are always welcome, and the benefits of giving appreciated securities are significant. By donating stock rather than selling it, you can avoid potential capital gains taxes. In addition, you may receive an income tax charitable deduction for the full fair market value of the stock on the date of the gift (assuming you have held the stock longer than 12 months). Please consult with your tax advisor to determine your tax savings.

Securities can be easily transferred from the donor's account to the Foundation's brokerage account:

1. Use the form below for instructions to the Broker
2. Fill in the appropriate information regarding the shares you wish to gift.
3. Check with your broker to see if they require a signature guarantee.
4. Mail a copy of the letter to the Foundation so we can track your gift:
   SMHSF, 204 East 2nd Avenue, #617, San Mateo, CA 94401

DTC: Clearing__0164____, Code__40____

San Mateo High School Foundation

Acct#___22879421____

Charles Schwab & Co.

P.O. Box__52114____

City___Phoenix____

State__AZ____

ZIP__85072____

Tax ID #20-0027218

SMHSF Contact:

info@smhsf.org