



San Mateo High School **FOUNDATION**

SMHSF SECURITIES DONATION FORM

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 want to 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 that we can track your gift:
SMHSF, 506 North Delaware Street, San Mateo, CA 94401

DTC: Clearing 0164 Code 40

San Mateo High School Foundation

Acct# 22879421

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