

FAIRVIEW ODD FELLOWS HOME OF CT

235 Lestertown Road
Groton, CT 06340
860-445-7478 x1503
860-445-9575



Giving a Gift of Securities to Fairview

Gifts of securities such as stocks, mutual fund shares, or other appreciated assets can be a tax efficient method for making a gift to Fairview. In most instances, you can typically take a tax deduction for the full market value of the gift and avoid any capital gains tax. Here is a quick guide to ensure the successful execution of your unrestricted, publicly traded securities.

If you physically hold certificates complete only the signature section on the reverse side of the stock certificate and send to:

Tricia Cunningham
Director of Community Relations
Fairview Odd Fellows Home of CT
235 Lestertown Road
Groton, CT 06340

If the stock is held in a brokerage account, simply instruct your broker to electronically transfer the stock to:

Matthew Cowles
Investment Adviser Representative
The Schuster Group
135 South Road
Farmington, CT 06032
T: 860.507.8885
Toll Free: 800.388.9771
F: 860.409.7522

Notify Tricia Cunningham of your gift by faxing a copy of the transfer instructions or this statement to 860-445-9575.

If you are transferring mutual funds, restricted stocks, or closely held securities, contact Tricia Cunningham at 860-445-7478 x1503.

It is important to note the name of Fairview. Please make sure your broker includes **Fairview Odd Fellows Home of CT** and **your name** in the transfer information so that we may credit you promptly and properly.

In all cases, please complete the information below in advance of your transfer and fax it to us at 860-445-9575. If unable to fax this information to us, please contact Tricia Cunningham at 860-445-7478 x1503 to provide the information by telephone.

Donor's Name _____ Date _____
Home Address _____ City _____ State ____ Zip _____
Daytime Phone _____ Fax Number _____ Email _____
Name of Broker _____ Name of Security & # Shares _____