

FAIRVIEW ODD FELLOWS HOME OF CT

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



Fairview

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:

Sandra Hawes
Director of Marketing & IL Resident Services
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:

UBS Financial
DTC# 0221
Odd Fellows Home of Connecticut
Account #BW15567PO
Attn: Cynthia Lashley
(203) 977-7205

Notify Sandra Hawes 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 Sandra Hawes at 860-445-3235.

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 Sandra Hawes at 860-445-3235 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 _____