

Gift of Appreciated Securities

Benefits to the Donor

Appreciated stocks or bonds can be contributed for a particular academic program, equipment or technology, or scholarship, or for general educational purposes. You benefit two ways when you make a gift of appreciated securities:

- 1) You use the full fair market value of securities on the date of the gift to calculate your income tax charitable deduction; and
- 2) You do not have to pay capital gains tax on the appreciation.

No matter which method you choose to transfer your gift securities, it is best if you or your representative advise the College of Marin that you are making the gift and indicate its terms and purpose.

College of Marin is a 501(c) (3) non-profit organization. The college's Federal Tax ID number is 68-0194359, and its legal name is Marin Community College District.

How to Give Securities to College of Marin

A. Delivery by your stockbroker

Donors sometimes prefer to deliver securities through their stockbroker. If you use this method, you should deliver the certificates to your broker with instructions to hold them for College of Marin and call the Advancement Office.

B. Electronic Transfer

To initiate an electronic transfer, please call the Advancement Office, (415) 485-9653, to notify COM of your intent to make a gift of stock. Contact your stockbroker to give your instructions regarding the stock and number of shares to donate. Please see sample letter authorizing transfer of stock.

Marin Community College District

Wells Fargo Advisors

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415 257-2504

Account# 2927-3975 | DTC # 0141 | Tax ID 68-0194359

C. Delivery by mail

Please send the certificates to the following address. Do **not** sign the certificates.

College of Marin, Advancement Office, 835 College Avenue, Kentfield, CA 94904

It is preferable to send the certificates by certified mail, return receipt requested.

Please contact your stockbroker to obtain the following information:

- A separate **stock assignment form** is required for each issue or certificate of stock included in your gift. It is recommended that the signed stock power form(s) be mailed under separate cover to the above address as well.
- Please include a separate **security release form** signed by the owner of the securities with the stock assignment form(s).

D. Direct delivery

Gifts of securities can be hand-delivered to a staff member of the College of Marin located in the Academic Center on the Kentfield campus. Each certificate or issue that is part of the gift should be accompanied by:

A **stock assignment form** (stock power) signed by the owner(s) of the securities, exactly as each name appears on the certificates.

A **security release form** signed by the owner of the securities.

For More Information

To discuss in detail a gift of appreciated securities to benefit students of College of Marin, contact Dr. Linda Frank, Executive Director of Development, (415) 485-9528 or lfrank@marin.edu for a confidential appointment.

The Internal Revenue has determined that the Marin Community College District (MCCD) is a tax-exempt organization under Section 501(c) (3) of the Internal Revenue Code. The MCCD, also known as College of Marin, has two campuses in Kentfield and Novato, California. All gifts or bequests to benefit the College of Marin should be designated with the Marin Community College District as the beneficiary. Gifts to the MCCD are tax deductible. The District Federal Tax ID is 68-0194359.