

**Instructions for Gifts of Stock**

Gifts of appreciated securities offer a relatively simple way to make charitable gifts. If the securities have been held for one year or longer, the current value generally is tax-deductible up to 30 percent of adjusted gross income, with a five-year carryover if the gift amount is more than the 30 percent limit.

Generally, gifts of stocks, bonds, or mutual funds can be transferred from your brokerage account to the Foundation’s account with Mason Securities, Inc. You will need to authorize your broker to make the transfer and provide the following information:

**For all DTC eligible securities:**

Firm: TD Ameritrade, Inc.

DTC#: 0188

Account #: 931 022 412

Account Name: Community Foundation of Bloomington and Monroe County

Contact: Mason Securities, Inc.

Phone #: (703) 716-6000

**If you have questions about making a transfer please contact:**

Sandy Stransky, Broker/Dealer Operations Manager

Mason Investment Advisory Services, Inc.

11130 Sunrise Valley Drive, Suite 200

Reston, Virginia 20191

Phone: (703) 716-6000, ext. 120

Fax: (703) 716-6020

E-mail: [sstransky@masoncompanies.com](mailto:sstransky@masoncompanies.com)

Website: [www.masoncompanies.com](http://www.masoncompanies.com)

**To provide gift and donor information, as well as additional questions, please contact us at the Community Foundation:**

Meagan Niese, Development Director

Phone: (812) 333-9016

Fax: (812) 333-1153

E-mail: [meaganniese@cfbmc.org](mailto:meaganniese@cfbmc.org)

Community Foundation of Bloomington and Monroe County

100 S. College Avenue, Ste. 240

Bloomington, Indiana 47404

*Please contact our office for alternate instructions if you prefer to deliver stock certificates.*