



GIFTING APPRECIATED STOCK DONATIONS TO HART

If you own stock that has significantly appreciated in value and you have owned that stock for at least one year, instead of selling it and owing capital gains taxes on the sale, you can make a gift of that stock to HART.* HART then sells the stock, and since HART is a nonprofit, HART does not pay tax on the sale and can use the full value of the stock to benefit the cats and kittens in its care. Your broker or investment advisor is familiar with this process and will assist you in making the gift.

To make a stock gift, please follow the instructions below:

STEP 1. COMPLETE THE TRANSFER

Provide the following instructions to your bank or brokerage firm:

Please include the donor name in the transfer. When the donor's name is added to the delivery instructions, it helps HART identify the gift and promptly acknowledge it.

DTC Book Entry Instructions

Broker: Please note that Bath Savings Trust Company is NOT ACAT eligible.

Deliver to: Fifth Third Bank

DTC Number: 2116

Bath Savings Trust Company Acct No: 010033036506

FFC: Homeless Animal Rescue Team Gift Acct.

Donor Name: _____

STEP 2. NOTIFY BATH SAVINGS TRUST COMPANY

Please ask your broker to notify the Bath Savings contact named below that a gift is being made to HART. Notification prior to delivery is greatly appreciated and facilitates accurate allocation of the gift.

Ginger Doughty
207-443-6296
gdoughty@bathsavings.bank

STEP 3. NOTIFY HART



Please complete the *Notification of Stock Donation Form* (on the next page) and send it to:

Jessie Butler, HART Finance Committee
jessie.butler@hartofme.org

NOTE: For gifts of other types of securities, such as mutual funds or government securities, please contact Ginger Doughty at Bath Savings directly for additional instructions. Do not use the above delivery information.

**Please consult with your tax advisor/preparer to make sure these options are of benefit to you. Also, see IRS.gov for more information about QCDs and donating stock to nonprofits.*

Homeless Animal Rescue Team of Maine

Mailing Address: PO Box 351, Cumberland, ME 04021 | **Shelter Address:** 302 Range Rd, Cumberland, ME 04021
207-829-4116 | info@hartofme.org |   **HARTofME.org**



NOTIFICATION OF STOCK DONATION

DONOR INFORMATION

Name _____
Mailing Address _____
Email Address _____
Phone Number _____

BROKER/ADVISOR INFORMATION

Name & Firm _____
Mailing Address _____
Email Address _____
Phone Number _____

STOCK INFORMATION



Stock Name _____
Number of Shares Being Transferred _____
Approximate Date of Transfer _____

- I wish this gift to remain anonymous
- I wish this to be In Memoriam or in honor of (*provide name and any other applicable information*):

SEND TO:

Once completed, please send this form to:
Jessie Butler, HART Finance Committee
jessie.butler@hartofme.org

Homeless Animal Rescue Team of Maine

Mailing Address: PO Box 351, Cumberland, ME 04021 | Shelter Address: 302 Range Rd, Cumberland, ME 04021
207-829-4116 | info@hartofme.org |   **HARTofME.org**