Gifting Appreciated Stock
To First Unitarian Society of Milwaukee

Why gift stock?

You can gift appreciated stock held over one year and receive a charitable deduction for tax purposes. First Unitarian Society of Milwaukee is an exempt institution and does not pay tax on gains.

What is the procedure to gift stock?

Your request to transfer shares will need to be in writing. The date the stock is transferred is the date used for First Unitarian Society of Milwaukee calculation of your charitable contribution. For stocks, the average of the *High* and *Low Trading Price* for the day is used.

The brokerage account we use for gifts is at RBC Wealth Management. Please contact Linda Cowan, or Andy Cowan at RBC Wealth Management, and inform them that you will be transferring stock to us. They can be reached at:

Linda Cowan CRPC®, CPFA (414) 347-7088 linda.cowan@rbc.com
Managing Director-Financial Advisor
NMLS #1777929 through City National Bank

Andrew Cowan, CFA ®, CPFA® (414) 347-7139 andrew.cowan@rbc.com
Senior Vice President - Financial Advisor
NMLS #1863098 through City National Bank

Contact your Financial Advisor or Brokerage Firm
Ask them for assistance in transferring your stock to First Unitarian Society of Milwaukee with a letter in writing stating the following:

> To **"name of your financial advisor":**
>
> Please transfer **(number) shares of (name of stock)** to
> RBC account #302-94099 First Unitarian Society of Milwaukee, DTC # 0235.
>
> **Please disclose our name to First Unitarian Society of Milwaukee (**if you would like to be acknowledged, or the gift will be anonymous).
>
> **Sign and date your letter.** (**Both** signatures will be needed if the gift is coming from a joint account).

It is our policy to sell all securities when they are received.

RBC Wealth Management will prepare a letter for you and for First Unitarian Society of Milwaukee that shows the amount of your charitable contribution for tax purposes.

Thank you for your generosity.