



Giving a Gift of Stock has Many Benefits

- Your gift of stock is exempt from capital gains tax and you can claim the full amount of your gift on your tax return.
- Smith River Alliance can work directly with your broker to facilitate your gift.

How Do I Make a Stock Gift?

The easiest way to make a gift of stock is to transfer the shares electronically. Tell your broker or financial advisor you would like to make a stock gift to Smith River Alliance, and give them these instructions. Donors will receive a formal acknowledgment and tax substantiation.

1. Please call Patty McCleary at **(916) 799-9352**, or email Patty@smithriveralliance.org or mail a letter to Smith River Alliance, PO Box 2129, Crescent City California 95531, and provide the following:

- Name of donor, address and telephone number
- Name of stock or mutual fund and number of shares
- Anticipated date of transfer
- Restrictions on the purpose of the gift, if any
- Special instructions, if any

2. For your stock gift to be delivered into our account, please provide your stock broker with our account information:

Ameriprise Financial

For A/C of Smith River Alliance
Account # 0000 5730 1145 9 133
Attn: Susan Morrison, 4111 Ellison St. NE Ste A, Albuquerque, NM 87109
505 433 2255
susan.morrison@ampf.com

Account Name:

Smith River Alliance [Tax ID# 94-2650838]

3. You may also mail your unendorsed certificate(s) and stock power, in separate envelopes, by registered mail to:

Smith River Alliance

PO Box 2129
Crescent City, CA 95531

PLEASE NOTE: Smith River Alliance cannot render tax or legal advice, and this information is not intended as such. We recommend that you **work with qualified financial and legal advisors.**

The **Federal Tax ID number** for Smith River Alliance is 94-2650838.