



CORTE MADERA LARKSPUR SCHOOLS FOUNDATION

ANOTHER WAY TO GIVE.....GIFT OF STOCK

Donation options to CMLSF have been improved and expanded to include gifting appreciated stock!

Donating appreciated securities has significant benefits:

- **You don't pay capital gains tax when you make a stock transfer directly to CMLSF.**
- **You qualify for a tax-deduction based on the fair market value of the stock if you have held your stock for over a year.**

Please consult with your tax advisor for more information.

To make a gift of stock, simply instruct your broker by filling out the stock transfer form to transfer the shares to the Foundation's Charles Schwab account. Electronic transfer instructions will be provided upon request or on our website. Once you have initiated the stock transfer with your broker, please mail the form to the Foundation office at 230 Doherty Drive in Larkspur. The Foundation must be aware of your intention so that we can monitor the account for receipt. All stocks transferred to the CMLSF will be valued and recorded as of the date the donor relinquished control of the asset in favor of CMLSF.

**For more information, please contact
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Thank you very much for your support!