

GIFT OF STOCK FORM

Thank you for your interest in making a charitable gift to Root Division in the form of a Stock Transfer.

Donor Tax Benefit

Making a charitable gift of publicly traded stock is often advantageous from a tax point of view, especially if you own appreciated stocks subject to long-term capital gains. By making the gift directly to Root Division, you avoid the capital gains tax on the appreciation of the asset and realize an income tax deduction equal to the asset's fair market value on the date of the gift. You may also save on brokerage fees, because you are transferring ownership rather than selling the stock.

Every individual's tax situation is unique, so we encourage you to consult your tax advisor to coordinate your gift of stock to Root Division.

Donor Instructions

Step One: Please contact Root Division's Executive Director to share your intention to donate stock, so she might carefully monitor your generous transaction and alert the development team to release your desired donation acknowledgment to share with your tax accountant. Please complete and return the second page of this form to:

Michelle Mansour
Root Division
1131 Mission Street
San Francisco, CA 94103

michelle@rootdivision.org
415.863.7668

Step Two: Please share the needed information below with your broker to facilitate the stock transfer.

Root Division's Brokerage House: Fidelity Investments
Account Name: Root Division
Account Number: Z48-727536
Root Division's Tax ID#: 73-1711252
DTC Number: 0226



A visual arts non-profit that connects arts education, exhibitions and studios.

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Please complete the information below to notify Root Division of your gift and help ensure it is processed accurately. Please e-mail the completed information to **Michelle Mansour** at michelle@rootdivision.org

Donor & Securities Information:

Name & Type of Securities (e.g.: DELL common stock) _____ Security Symbol _____ Number of Shares ____/____/____ Transfer Date

Donor Name (Individual, Corporation, Foundation)

Donor Street Address

Donor City / State / ZIP

Broker Name

Broker Company / City/ State

Broker Contact / Telephone Number

Donor Telephone / Email Address (to be used only if a question arises in the donation process)

Donor Signature ____/____/____ Date Signed _____ Donor Signature

Note - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures) Please consult with your tax advisor before making a charitable donation to any charity. You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs.

Thank you again for considering Root Division as the recipient of your charitable gift.