Private: Gifts of Stock

Giving stock can help you and DSCI convert your stock market gains into real community change.

Information for your broker

Information for electronic stock transfer to Denver Sister Cities International:

**Brokerage Account:** Wells Fargo  
**Contact:** Kathleen Counts  
**Phone:** 410-385-9238  
**Email:** Kathleen.Counts@wellsfargoadvisors.com  
**DTC#:**  
**Account #:**

Your broker may also ask for the following information:

<table>
<thead>
<tr>
<th><strong>DSCI legal name:</strong></th>
<th>Denver Sister Cities International, Inc.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Federal Tax ID:</strong></td>
<td>84-6032193</td>
</tr>
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</table>

The donor or the transferring broker must also provide the following information, for audit and acknowledgment purposes:

- Donor’s name and complete address  
- Name and number of securities transferred

Please notify DSCI at the time of transfer by contacting our office via email or by calling our office at 303-832-1336; or by sending a letter to Denver Sister Cities International, 2650 E. 40th Avenue, Denver CO 80205.

Frequently asked questions

Take a look at some answers to frequent questions about giving a gift of stock – including financial examples of a general nature. Please consult with your accountant, attorney or other professional advisor regarding their applicability to your particular circumstances.
What are the advantages of transferring appreciated stock to DSCI?

If you have held the stock for more than 12 months, you will completely avoid paying any capital gains tax and receive a tax deduction for the full value of the stock. By avoiding capital gains tax, the net cost of such a gift can be surprisingly low. Suppose, for example, that you are in the 35% tax bracket and you contribute stock with a value of $10,000 and a cost basis of $2,000. The following chart illustrates your savings:

<table>
<thead>
<tr>
<th>Current Value</th>
<th>$10,000</th>
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<tbody>
<tr>
<td>Tax Savings from Deduction</td>
<td>$3,500</td>
</tr>
<tr>
<td>Capital Gains Taxes You Save</td>
<td>$1,600</td>
</tr>
<tr>
<td>Net Cost of Gift</td>
<td>$4,900</td>
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</tbody>
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What should I do if my stock has depreciated in value?

Sell the stock and give the cash proceeds. You will be entitled to two deductions, one for the capital loss and the other for the charitable gift. Do not, however, give the depreciated stock directly to a nonprofit organization like DSCI, as you will not be able to take a deduction for the capital loss.

What if I want to keep my stock portfolio as it is?

If you are planning to make a year-end cash gift – $5,000 for example – and you also own appreciated stock that you want to retain, contribute $5,000 worth of stock and repurchase the stock on the market with your cash. You receive the same $5,000 charitable deduction, you pay no tax on the capital gain, and you increase your cost basis, thereby reducing the capital gains tax due when you eventually sell the stock.