



Instructions for Making a Donation of Stock or Charitable Assets to Georges River Land Trust

Thank you very much for considering a gift of stock to the Georges River Land Trust (GRLT). Many of our donors find giving appreciated securities to charity to be a tax-savvy strategy. When you give appreciated securities, you may receive an immediate tax deduction for the amount of the gift without any taxation of the donated securities' appreciated value. It is our goal to make gifts of this type as easy as possible for you. To facilitate your gift, please contact your broker and instruct the broker to make an electronic transfer of shares to the Maine Community Foundation for further credit to GRLT.

STEP 1: You or your broker will need to contact Karen Hartt or Jim Geary at MCF before transferring securities with details of the transfer and how your contribution should be used. 1-877-700-6800 ask for Karen Hartt (x1114) or Jim Geary (x1103) or via email khartt@mainecf.org or jgeary@mainecf.org.

FBO: Maine Community Foundation
Account: #BP-62195-AH
Tax ID: 01-0391479

DTC Publicly Traded Securities:
DTC: # 0221 (*see note below)
FBO: Maine Community Foundation
Fca: BP-62195-AH
For further credit to: Georges River Land Trust
Donor name: _____

*Please request all eligible securities transfer via DTC as the ACAT system presents a 2-3 business delay/settlement in delivery to their UBS account, which may adversely affect the sale price of the securities due to market fluctuation.

Whenever possible, please let us know of your impending gift to facilitate proper allocation and acknowledgment – (207) 594-5166; megan@grlt.org.

Once the transfer has been made to Maine Community Foundation, the account manager sells the stock and transfers the proceeds directly to GRLT and sends us a confirmation letter stating the “Mean Value of the Gift,” number of shares, and effective date of gift. We will immediately acknowledge your gift with this information for your tax records.

**Thank you for considering a gift of stock
to conserve the special places along the Georges River!**