



Securities Gift Form

Appreciated securities such as stocks and bonds are excellent assets with which to fund your charitable gift to Housing Hope. Donating appreciated securities offers distinct tax advantages as well. If your publicly traded stocks or bonds have appreciated in value and have been held for 12+ months, you may reap both capital gains and income tax advantages. Because of their complexity, securities gifts are best made by Dec. 15.

YOUR INFORMATION

Name _____

Email _____

Address _____

How would you like to be recognized in print?

I/we wish to remain anonymous

INFORMATION FOR YOUR BROKER

To give a gift from your securities portfolio, please contact your broker to initiate the transfer, using the delivery information below:

Receiving Firm Name: **UBS Financial Services - DTC # 0221**
Account Name: **Housing Hope**
Account Number: **7F03818 01**
Housing Hope Tax ID: **94-3060709**
Contact: **Meghan Antonucci, 425-349-0469, megan.antonucci@ubs.com**
Account Type: **BSA**
Reference: **Gift to Housing Hope from [your name]**

Often securities dealers do not pass along your contact information our broker when you initiate a transfer. So that we can properly recognize your gift, please let us know when you have initiated the transfer by contacting Resource Development at 425-347-6556 or giving@housinghope.org. Or you may simply mail a copy of this form to Housing Hope, 5830 Evergreen Way, Everett, WA 98203 to update us.

Number of shares _____ Estimated value \$ _____

Security name _____ Security Symbol _____

Housing Hope is a 501(C)(3) exempt organization, tax identification #94-3060709. No goods or services have been received in exchange for this gift. Please consult with your tax advisor regarding its deductibility. We may acknowledge you publicly as a supporter, using your name as it appears in this letter, unless you request otherwise. If you would prefer to receive our communications via email or on a quarterly or annual basis, please contact us at giving@housinghope.org.