

GIFTS OF SECURITIES

Giving appreciated securities is a great way to support A New Leaf. This type of gift can help you avoid capital gains tax while allowing you to claim a deduction equal to the fair market value of the gift at the time of transfer. The date of your gift will be the date the securities are received in A New Leaf's brokerage account. A New Leaf can sell the securities tax free and use the funds to achieve your wishes.

PLEASE NOTE

Securities transfers do not include the donor's name or address. To ensure that your gift is recorded and acknowledged correctly, you **MUST** provide the following information to A New Leaf before transferring shares:

- Your name, address, and phone number
- Your broker's contact information
- Number and type of shares to be transferred
- Approximate date of transfer
- Special instructions (preferred recognition/anonymity, gift purpose, etc.)

Please notify:

Catherine A. Dyciewski
Chief Financial Officer
cdyciewski@turnanewleaf.org
480.477.4014

Joe Dulin, CFRE
Chief Philanthropy Officer
jdulin@turnanewleaf.org
480.890.4874

INFORMATION TO SHARE WITH YOUR BROKER

Account Name: A New Leaf
Fed Tax ID: 86-0256667
Account Number: 7291-1688
DTC Number: 0164
Broker: Charles Schwab (800) 435-4000

A New Leaf recommends that you consult your legal or financial advisors when considering what type of planned gift best suits your unique circumstances.

For more information about making a gift of securities, please contact:



Brad Harris, CFRE, CAP®
Senior Director of Estate and Gift Planning
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