

**Appreciated Stock**

**A Wonderful Way to Give**

Donating appreciated stock is a wonderful giving option for both you and the Biddeford Education Foundation. Not only will you be investing in our community’s education, but, if you own a stock or mutual fund that has gone up in value, you can deduct the current market value on your tax return, *regardless of what you paid for the stock,* and you avoid capital gains tax.

**Please be sure to contact your tax advisor about how a gift of appreciated securities will impact your specific situation.**

**It’s easy!**

1. Please call your broker about the stock and number of shares you would like to contribute. Instruct your broker to transfer shares to:

Edward Jones

20 Edwards Avenue, Suite 4

Biddeford, ME 04005

Contact: Matt Simmons

Phone: 207-282-7575

E-mail: Matt.Simmons@edwardjones.com

Biddeford Public School Education Foundation ID Number: 22-3233401

*2.* Please contact the Biddeford Education Foundation with information about the type of stock and number of shares you are donating. *(Please note that we will not accept gifts of tobacco company stock.)*

Karen Chasse

Foundation President

18 Maplewood Avenue

Biddeford, ME 04005

Phone: 207-391-6885

Fax: 207-284-7956

E-mail: [kchasse@biddefordschools.me](mailto:kchasse@biddefordschools.me)

3. As soon as is reasonable after the transaction, please provide either a gift letter from your broker (specifying stock type, number of shares, value per share and date of transfer) **OR** a copy of any document that indicates your instructions to your broker. (Please send to Biddeford Education Foundation address listed above.)

*Giving this way has special benefits for our all of us, and we thank you in advance for your gift!*