



How to Donate Appreciated Long-Term Securities to the Transforming Center

Transforming Center donors are always looking for ways to make their charitable dollars go farther and make more of a difference. Donating long-term appreciated securities directly to the Transforming Center — rather than selling the assets and then donating the cash proceeds — is one of the best and easiest ways for donors to give more. (Please note: the Transforming Center has a *sell immediately* policy regarding gifted securities.)

If your securities are held in an account:

- a. Ask your broker to make an electronic transfer of the securities to The TransformingCenter's account, as follows:
UBS Account # HB
51425UBS DTC # 0221
- b. When the securities are received into the Transforming Center's account, we will sendyou a receipt.

The amount of the tax deduction is the value of the security at the time of sale. This maybe slightly different than the value on the day you authorize the transfer.

If you hold the paper certificate for your securities:

- c. Execute a separate stock power and complete a letter of authorization (separate document we will supply). *Your signature(s) will need to be guaranteed by a financial institution that has your signature(s) on record.*
 - d. If you have already had the certificate reissued in the name of The Transforming Center, itis not necessary to provide us with a stock power.
 - e. In either case, send the documents to us at **400 W. Roosevelt Rd. Suite 100, Wheaton, IL 60187** via registered mail or express mail (UPS, FedEx or USPS).
 - f. When the documents are received, we will send you a receipt.
2. If you are transferring shares of a mutual fund:

Please contact Andrea Sung by phone (630-588-8133 x308) or by email (asung@transformingcenter.org) with the:

- a. Name of your mutual fund company
- b. Contact information of your broker (if any)
- c. Name or symbol of the securities
- d. Number of shares; and expected transfer date

Each mutual fund company has a unique procedure, so our UBS Financial Services representative will need to contact your mutual fund company or your broker to coordinate the transfer.