



Alzheimer's & Dementia Alliance of Wisconsin Stock Donation Instructions

For our friends who are also investors, donating stock to the Alzheimer's & Dementia Alliance of Wisconsin (ADAW) can make sense for several reasons. Donating stock can potentially minimize taxes by getting a tax deduction for the fair market value of the stock, avoiding the capital gains tax on the stock's appreciation, and help further the Alzheimer's & Dementia Alliance of Wisconsin's mission.

Stock transfers do not need to be complicated or expensive. Here are the steps necessary to transfer stock from your brokerage account to ADAW:

If you wish to donate stock or mutual funds held in a brokerage account, please give your broker the following information:

1. Name of stock that you wish to donate and the number of shares
2. Depository Trust Company (DTC) #0075
3. Credit Alzheimer's & Dementia Alliance of Wisconsin's account #5728-8153

Have your broker notify Jeff Supple at SB Financial Services/LPL Financial that a donation is coming with the name of the stock/mutual fund and the number of shares. This can be done by calling Jeff at (608) 849-2706 or by email jeff.supple@lpl.com.

If your stocks are held in certificate form (you have physical possession) or you wish to donate mutual funds held directly at the mutual fund company, please contact Jeff Supple (608) 849-2706 or Kristen Corcoran (608) 849-2775 at SB Financial Services/LPL Financial for instructions.

Once the stock or mutual funds have been transferred, you will be credited for an average of the high and low trading prices on the day of the gift. Jeff will contact ADAW and advise us on the amount of the gift and the date of the transfer. Someone from ADAW will send you a "Thank You" and notification of the amount donated for tax purposes.

Everyone's tax and financial situation is different. You should consult a tax advisor and/or your financial advisor/planner to make sure donating stock is in your best interest.