

Turning Stock Market Gains into Community Investment

Gifts of appreciated stock and mutual funds help you avoid capital gains taxes and support Metropolitan Family Service in helping more than 37,000 children, families, and older adults each year.

If you are holding appreciated securities and have owned them for longer than 12 months, there could be a tax advantage in giving them to Metropolitan Family Service. These long-term holdings will bring you a charitable deduction equal to their current fair market value, and the capital gain is not recognized as taxable income.

For short-term holdings (securities you have owned less than 12 months) you may be limited to a tax deduction for only the amount you paid originally.

Gifts may be made to Metropolitan Family Service through your broker as follows:

- Contact Jana Richardson, Development Director, at 503.230.1451, and notify her that you will be transferring them irrevocably to our account at Charles Schwab, which is managed by Lori Flexer of Ferguson Wellman Investments.
- To transfer your gift of stock to Metropolitan Family Service, your broker will need three critical pieces of information:

Our account number at Charles Schwab: Metropolitan Family Service
Account #5118-9969

Our agent's DTC number: 0164 Code: 40

Questions? Please contact: Jana Richardson
Director of Development
janar@metfamily.org
503.230.1451

Our mailing address: Metropolitan Family Service
1808 SE Belmont St.
Portland, OR 97214

Thank you for your generous donation!



Metropolitan
Family Service
www.metfamily.org

Metropolitan Family Service is a private, nonprofit 501(c)(3) organization.
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