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 18,000 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 Matt Bartolotti at mattb@mfs.email or (503) 860-9406, and notify him that you will be transferring them irrevocably to the MFS account at Charles Schwab, which is managed by Luz Garcia at Ferguson Wellman Investments.

- To transfer your gift of stock to Metropolitan Family Service, your broker will need two critical pieces of information:
  1. Our account number at Charles Schwab: Metropolitan Family Service
     Account #5118-9969
  2. Our agent’s DTC number: 0164 Code: 40

Questions? Please contact: Matt Bartolotti
mattb@mfs.email
(503) 860-9406

Our mailing address: Metropolitan Family Service
PO Box 24041
Seattle, WA 98124

Metropolitan Family Service is a private, nonprofit 501(c)(3) organization.
EIN# 93-0397825

*Thank you for your generous support!*