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Instructions for Making a Stock Gift

Gifts of appreciated stock can yield tax benefits because they are deductible from your income tax at fair market value. This kind of gift avoids capital gains tax that would otherwise result from selling the stock and then using the cash to make your gift to PEAC. Gifts of appreciated assets are deductible in amounts up to 30% of adjusted gross income, and any excess deductions may be carried over for use in the future. Stock transferred in this fashion is valued on the date of the transfer. To donate stock to PEAC accurately and efficiently, please follow these steps:

STEP ONE. Inform your broker of your intent.

STEP TWO. Contact PEAC to notify us of your plans to make a gift of stock, specifically:

- Your name and contact information
- Your broker's name and telephone number
- Name of the stock
- Number of shares you wish to transfer

STEP THREE. Have your gift of securities transferred to our brokers at:

UBS Financial Services
Lindsey Faux or Matt Sorenson
Tel. (503) 225-9239 Fax (503) 225-0553
DTC No. 0221, Account No. LL22266
L&C Tax ID No. 93-0386858
NOTE: "GIFT FOR PEAC AT L&C LAW SCHOOL"

For questions or assistance, please contact PEAC at (503) 768-6600.