



STOCK GIFT INFORMATION

Thank you for your interest in making a charitable gift to Heading Home in the form of a stock transfer.

Benefits You Can Receive from Your Gift of Stock

- Your gift of stock can entitle you to a federal income tax charitable deduction when you itemize your tax returns.
- If you have held the stock for at least one year, you may deduct the full fair market value of your gift.
- In addition, you will avoid paying capital gains tax on all stock that you chose to donate to Heading Home.

For stock held in brokerage accounts, your broker/custodian can assist you in making your gift via a direct transfer to Heading Home. If you would like to make a donation of stock to Heading Home (tax ID # 20-1917517), please provide this information for an easy electronic transfer:

- Brokerage Firm: US Bancorp Investments
- Representative: Miguel Macias; 505-962-1970
- DTC #: 0280 (Code 40)
- Account Owner: Heading Home NM
- Account Number: 27806876
- Reference: Donor Name (Including your name will ensure the gift is properly acknowledged)

Please notify us of all stock gifts!

Please have your broker/custodian notify Heading Home Development staff of any stock transfer. This will assist us shepherd your gift securely through the transfer process. Please notify:

Cindy Ortega, Executive Advancement Director at CindyO@headinghome.org or phone 505-344-2323, ext. 203, or fax to 505-226-1705.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for supporting Heading Home with your charitable gift! We're deeply grateful for your generous support and partnership.