

You invest. A child profits. It’s that simple. By making a donation in the form of stocks, bonds, mutual funds or other appreciated securities, you are making an investment in the future of children in your community.

As a donor, you are entitled to take a charitable deduction for the full fair-market value of appreciated securities held longer than one year, and you usually avoid paying the capital gains tax that would be due if you sold the securities.

**Donating Stock or Bonds Held By a Bank or Broker**   
If your equities are currently held at a bank or in a brokerage account, simply send a letter of instruction to your broker or banker with a full description of the securities and your gift's intended purpose. Securities can be sent electronically using the following transmittal instructions:

**Robert W. Baird & Co  
Big Brothers Big Sisters of Ozaukee**

**Account #7519-9585 DTC #0547**

For more information, please contact Michael Ratkovich at Baird North Shore at (262) 240-3500. Please advise us of your gift by contacting our Executive Director, Nicole Bulow, at (262) 377-0784 or by email at [nicoleb@bbbsoz.org](mailto:nicoleb@bbbsoz.org).

**Effective Date and Value of Your Gift**  
Your gift of stock or publicly traded securities will be valued based on the mean market price of the securities on the gift date. We will provide you with a receipt for your tax records. Big Brothers Big Sisters determines your gift date according to the following guidelines:

* By mail, it is the later of the postmark dates of your separately mailed stock certificates and stock powers.
* By electronic transfer, it is the date that the securities enter Big Brothers Big Sisters’ account.
* By hand, it is the date that a Big Brothers Big Sisters' employee receives the stock certificates and stock powers of attorney.
* By reregistering securities in Big Brothers Big Sisters' name yourself, it is the date on the new certificates (this method takes the longest).