

### **Gifts of Stock or Security Instructions**

A gift of appreciated securities that you have held for more than one year is one way to give and you will be eligible to take a federal income tax-deduction equal to the fair market value of the stock on the date of the gift for up to 30 percent of your adjusted gross income and will not have to recognize the appreciation as a capital gain.

The following is specific information about how to give securities or mutual fund shares to Miami Country Day School:

Important: These instructions do not constitute authority to open an account in Miami Country Day School's name.

#### *Securities held by your bank or broker*

Please notify your bank or broker that you are making a gift of securities to Miami Country Day School and instruct your bank or broker to please contact Caitlin Forsthoefel at [forsthoefelc@miamicountrydayschool.org](mailto:forsthoefelc@miamicountrydayschool.org)

#### *Securities held by you*

Please send unendorsed certificates by mail, along with a letter giving your name, address, and the purpose of your gift to:

Miami Country Day School

Attn: Advancement

601 NE 107th St,

Miami, FL 33161

Your bank or broker can supply you with blank stock powers. For most expedient handling, do not fill in MCDS's name as transferee on either the stock certificate or the stock power.

Provide the following information to Caitlin Forsthoefel at [forsthoefelc@miamicountryday.org](mailto:forsthoefelc@miamicountryday.org)