



Making a Gift of Appreciated Securities

Often gifts of appreciated securities are the best way to maximize the tax benefits of your gift. The Buck Institute for Age Research is pleased to accept donations of securities including stocks, mutual fund shares, and other equities. These gifts require special handling and coordination to insure correct recognition of the gift and accurate IRS records for you and the Institute. It is imperative that you and/or your financial representatives provide complete information directly to the Buck Institute, as well as to your broker, about such gifts:

PROCEDURES FOR TRANSFERRING APPRECIATED SECURITIES

1. Donors or their representatives need to inform the Buck Institute directly when stock gifts are made. Correspondence should provide the donor's name and address, the date of the instructions, the name of the stock, the number of shares, the estimated value and the purpose of the gift. This information should be sent to:

Office of External Affairs
Buck Institute for Age Research
8001 Redwood Blvd.
Novato, California 94945-1800

VIA FAX: (415) 209-2044

2. If the stock is in a brokerage or bank trust account the donor should take the following steps to make the gift:
Notify your stock broker/banker by telephone and follow up with a letter to transfer the stock to the Buck Institute account* using the following information:

Buck Institute Broker:	Charles Schwab & Co., Inc.
Address:	Corte Madera Branch 403 Corte Madera Town Center Corte Madera, CA 94925
Name on Account:	Buck Institute for Age Research
Account Number:	*7588-8165
DTC Number:	0164, Code 40
Representative:	Bill Schrader
Direct Telephone Number:	415-945-6404
Fax Number:	415-945-6422
Buck Institute Federal Tax ID No.:	94-3030609

3. If the gift of stock is a stock certificate registered in the name of the donor:

Mail the stock certificate(s) plus a signed stock power to the Buck Institute at the address provided above. Please mail the stock certificate(s) and stock power under separate cover since, in the case of loss or theft, the stock can be transferred only if the finder or thief has both documents.

4. Please note that the donor's signature on the stock power must be either notarized or guaranteed by a bank officer or stockbroker.

VALUATION OF YOUR GIFT

5. The gift is valued according to IRS regulations based on the DATE OF TRANSFER (not the date that instructions are made to the donor's stockbroker or the actual sale price) and the acknowledgment letter to the donor will specify the amount.
6. It is the Institute's policy to sell all gifts of securities upon receipt. The Buck Institute will contact its broker notifying him/her of a gift of stock and requesting immediate sale of the stock. The actual value of the stock on the date of sale does not affect your tax value and is not reported unless requested.
7. The Office of External Affairs tracks both the gift value to the donor and the actual sale price in its records.

For more information, please contact:

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Director of Major Gifts
Buck Institute for Age Research
8001 Redwood Boulevard
Novato, CA 94945

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Fax: (415) 209-2044
Email: mshifs@buckinstitute.org

Thank you for your support!