



Making Gifts of Appreciated Stock

Financial Benefits of Giving Appreciated Stock

Contributing appreciated securities can be an excellent way to make a gift to Forest Home. You benefit in two ways when you donate appreciated securities that you have held for more than twelve months. First you are entitled to a tax deduction for the full market value of the securities on the day the gift is received. Second, you avoid paying tax on the appreciation. Any unused portion of your contribution on your tax returns may be carried over and deducted over the next five years. You should check with your financial advisors before making a gift of appreciated securities.

Eternal Benefits of Making a Gift

Your gift will enable Forest Home to continue to provide a place away from the distractions of the world, where people can encounter the Lord of the universe in a deeply personal and meaningful way. Your generosity will translate into changed lives for Christ's kingdom.

How to Make a Gift of Stock

Forest Home accepts gifts of securities, including donated shares of publicly held corporations, stock options and shares of mutual funds.

To make a stock gift, please notify your broker that you wish to transfer securities into Forest Home's Charles Schwab account. You will need to give your broker the following information:

Charles Schwab

(800) 472-9813

Account #: 33850486

DTC #: 0164

Code #: 40

Forest Home Federal Tax ID #: 95-1855659

Please notify Forest Home about the gift transaction at the same time you instruct your broker to transfer securities into our Charles Schwab account. In order for us to properly receive the gifted shares into our account and to provide an accurate and timely acknowledgement for your tax records, please send us:

- A concurrent notification with your name, phone number, and address
- The type and number of shares being transferred
- The name and phone number of your broker

This notification should be sent to:

Forest Home

Office of Development

Phone: (909) 389-4370

Email: donations@foresthome.org

Thank you for your partnership in changing lives through Christ at Forest Home!