

# STOCKS & SECURITIES CHARITABLE DONATION

## Gifts of stocks & securities to Eversight

Thank you for your interest in giving to Eversight through a donation of securities. Gifts of appreciated securities are always welcome. Importantly, we recommend you consult your tax advisor about the implications and tax consequences of donating securities as Eversight is unable to provide tax advice.

If your securities are held in a brokerage account, most brokers require written instructions authorizing the transfer to Eversight. Please complete and submit the enclosed charitable donation form to your broker, instructing them to transfer your gift directly to Eversight.

It is Eversight policy to liquidate all gifts of stocks as neither the executive team nor our board officers are professional investment portfolio managers. Liquidated gifts are used as unrestricted income to advance our mission.

Once your gift is received, we will send a receipt verifying the nature of the gift, the gift valuation date and gift valuation amount. Gains or losses realized by the sale of the securities after receipt and any brokerage fees or other expenses of the transactions are excluded from the value of your gift. If the stock transfer is related to an open pledge to Eversight, the pledge balance will be reduced by the gift value of the stock gift.

If you have any other questions, please contact Gayle Geider, Philanthropy Support Specialist:  
[gayle@eversightvision.org](mailto:gayle@eversightvision.org)  
(800) 247-7250 Ext. 2621

Thank you for supporting our mission to restore sight and prevent blindness through the healing power of donation, transplantation and research. Your gift to Eversight has the power to transform lives.

# STOCKS & SECURITIES CHARITABLE DONATION FORM

Personal stock broker name \_\_\_\_\_

Brokerage firm name \_\_\_\_\_

Stock name \_\_\_\_\_ Stock donation quantity \_\_\_\_\_

Stock name \_\_\_\_\_ Stock donation quantity \_\_\_\_\_

Stock name \_\_\_\_\_ Stock donation quantity \_\_\_\_\_

Stock name \_\_\_\_\_ Stock donation quantity \_\_\_\_\_

Estimated amount of donation: \$ \_\_\_\_\_

Account owner name \_\_\_\_\_

Account owner phone number \_\_\_\_\_

Account owner primary address \_\_\_\_\_

City \_\_\_\_\_ State/province \_\_\_\_\_

Country \_\_\_\_\_ Postal code \_\_\_\_\_

Account owner email address \_\_\_\_\_

## Delivery Instructions for Depository Eligible Securities (DTC) For Brokerage

**PNC Bank**

**DTC #2616**

**Reference: 20-75-067-4493057 Eversight Gift Annuity Custody Account**

### Eversight contact

Gayle Geider, Philanthropy Support Specialist

gayle@eversightvision.org

800-247-7250, ext. 2621