

Making a Gift with Stock or Other Securities

Important Considerations

Gifts of stock or other securities can help you realize your philanthropic objectives through immediate gifts, pledges, or gifts made over your lifetime while reducing your capital gains tax liability.

To begin the process, consider consulting with your financial advisor or broker - there are often advantages to gifts of both appreciated and depreciated stock. Once you've determined that making a gift this way is in line with your goals and objectives, the process is easy.

Your financial advisor or broker will need to know the Cass Community Social Services' account information:

Receiving Firm Name: Cass Community Social Services, Inc.

Receiving Account Number: 61527046

DTC Number: 0793

Recipient's Registration type: Non-profit. The tax identification number is 38-3429921.

Our financial representative is:

Vern O. Moore

Vice President/Investments

Stifel Nicolaus & Company, Incorporated

17000 Kercheval Ave.

2nd floor, Suit 240

Grosse Pointe, MI 48230

(313) 866-4493

In addition, please notify the Cass Director of Major Gifts, **Melinda Conway Callahan** at (313) 378-7988, to ensure that the gift is both received and acknowledged appropriately.

Important information to share includes:

- Name of the stock being transferred
- Number of shares
- Approximate date of transfer
- Name and phone number of the broker making the transfer

Thank you for your consideration.