

Gifts of stock or mutual funds



Contributing appreciated securities to The Trust for Public Land

Gifts of long-term appreciated stock or mutual fund shares are an easy way to make a lasting contribution to The Trust for Public Land. Benefits include:

- Income tax savings – For securities you have owned for more than one year, you can take an immediate income tax deduction.
- Capital gain tax savings – Avoid capital gain taxes you would have incurred if you had sold the stock or mutual fund shares.
- Conservation support – Provide crucial support to The Trust for Public Land at a lower cost than if you had made a gift of cash.

How to make a gift of long-term stock or mutual fund shares

- [Notify The Trust for Public Land](#)

We ask that you or your broker notify The Trust for Public Land prior to sending or transferring shares. This will help ensure that your gift is handled properly and acknowledged for tax purposes. Contact information for The Trust for Public Land's Donor Outreach is provided on page two.

Please include the following information in your notification to The Trust for Public Land:

- Your name
- Number of shares
- Name of stock or mutual fund
- Trust for Public Land project/program the stock gift is intended to support (if applicable)

Donors can also use gifts of securities to endow their annual gift or establish a planned gift such as a Trust for Public Land gift annuity.

- [Transfer the shares](#)

The easiest way to give a gift of stock is through your broker. The Trust for Public Land has brokerage accounts at both Charles Schwab and Merrill Lynch. Notify your stockbroker in writing that you wish to make a charitable gift of stock to The Trust for Public Land, providing your broker with the Charles Schwab or Merrill Lynch account information listed on page two. We've included a sample stock transfer instruction letter for your broker on page three. If your own account is with Charles Schwab or Merrill Lynch, your broker may make an in-house transfer to The Trust for Public Land's account.

Donating stock certificates

If your stock or mutual fund shares are in certificate form, or if your broker prefers to send the actual stock certificates, please send the unendorsed stock certificates by registered mail. In a separate envelope, send a signed stock power for each certificate with the signature guaranteed by a bank or your authorized broker. Stock power forms are available from The Trust for Public Land.

Gifts of insider or restricted stock, stock options, or other appreciated property

For more information, including questions regarding gifts of insider or restricted stock, stock options, or other appreciated property, contact Trust for Public Land's Donor Outreach.

Please contact us directly for additional information if your donation is being made to fund charitable gift annuities, charitable trusts, or pooled income fund gifts.

THE TRUST FOR PUBLIC LAND ACCOUNTS AND CONTACT INFORMATION

The Trust for Public Land contact information:

Donor Outreach
The Trust for Public Land
PO BOX 889336
Los Angeles, CA 90088-9336
t: 1.800.714.5263
e: donor.outreach@tpl.org

Charles Schwab account information:

Charles Schwab & Co., Inc.
DTC # 0164
200 California St.
San Francisco, CA 94111
Account Name:
The Trust for Public Land
Account # 6248 9649

Merrill Lynch account information:

Merrill Lynch & Co., Inc.
DTC # 8862
555 California St., 9th Floor
San Francisco, CA 94104
Attn: Susanna Toy
t: 415.676.2645
Account Name:
The Trust for Public Land
Account # 270-04E42

Prior to transfer, notify The Trust for Public Land with the following information:

- Your name
- Number of shares
- Name of the stock or mutual fund

THE TRUST FOR PUBLIC LAND'S FEDERAL TAX ID # 23-7222333

Stock Transfer Instruction Letter

Date:

Stockbroker:
Brokerage firm:
Address:

Regarding: Transfer request to The Trust for Public Land

Name of stock owner/account:
Registration:
Account #:

Dear Broker Representative/To Whom It May Concern:

Please accept this letter as authorization to transfer from the shareholdings recorded under account number _____ to The Trust for Public Land, via our brokerage account, a gift of _____ shares of _____ stock [ticker symbol _____].

Please do not sell or redeem these units, as doing so may result in negative tax consequences. Before transferring, please first contact The Trust for Public Land.

Sincerely,

The Trust for Public Land contact information:

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PO BOX 889336
Los Angeles, CA 90088-9336
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e: donor.outreach@tpl.org

Charles Schwab account information:

Charles Schwab & Co., Inc.
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200 California St.
San Francisco, CA 94111

Account Name:
The Trust for Public Land
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Merrill Lynch account information:

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