



# Chinese American Service League

2141 South Tan Court | Chicago, Illinois 60616 | 312.791.0418 | CASLservice.org

## GIFT OF STOCK FORM

Please complete the information below to notify the Chinese American Service League (CASL) of your gift and help ensure it is processed accurately. Please email the completed form to Daniel Summins, Director of Development & Communications at [daniel\\_summins@caslservice.org](mailto:daniel_summins@caslservice.org).

### DONOR & SECURITIES INFORMATION

_____	_____	_____	____/____/____
Name & Type of Securities (e.g.: DELL common stock)	Security Symbol	Number of Shares	Transfer Date

\_\_\_\_\_  
Donor Name (Individual, Corporate, Foundation)

\_\_\_\_\_  
Donor Street Address

\_\_\_\_\_  
Donor Name (Individual, Corporate, Foundation)

\_\_\_\_\_  
Donor City / State / Zip

\_\_\_\_\_  
Broker Name

\_\_\_\_\_  
Broker Company / City / State

\_\_\_\_\_  
Broker Contact / Telephone Number

\_\_\_\_\_  
Donor Telephone / Email Address (to be used only if question arises in the donation process)

\_\_\_\_\_/\_\_\_\_/\_\_\_\_  
Donor Signature Date

\_\_\_\_\_/\_\_\_\_/\_\_\_\_  
Donor Signature Date

NOTE - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures).

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.



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## GIFT OF STOCK INSTRUCTIONS

Thank you for your interest in making a charitable gift to the Chinese American Service League (CASL) in the form of a Stock Transfer. **Please complete and return the preceding page of this form to receive your tax-acknowledgement.**

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to CASL. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to CASL (tax ID# 36-2984043), please note the following:

Brokerage House: TD Ameritrade, Inc.  
Account Name: Chinese American Service League  
Account Number: 884-570-452  
DTC Number: 0188

Financial Advisor: Mr. Bob Wilson  
111 W. Washington, Ste LL5  
Chicago, IL 60602  
312-516-3187 (Tel)  
312-516-3195 (fax)

Reference: Donor Name (Including your name will ensure the gift is properly acknowledged.)

### Questions?

Contact: Daniel Summins, Director of Development & Communications – 312.823-0406  
daniel\_summins@caslservice.org