

Stock Transfers to RMHC of Western Washington & Alaska

Securities may be the best asset for you to give to RMHC Here are a few general guidelines:

- 1) If you give appreciated securities that you have held for *at least one year* you can deduct the full fair market value (both the amount you paid for it and your gain). This is deductible up to 30 percent of your adjusted gross income in the year of the gift. Any excess may be deducted over the next five tax years.
- 2) If the *fair market value at the time of the gift* is more than \$500, you will need to fill out Internal Revenue Service Form 8283--Noncash Charitable Contributions form and submit it to RMHC. RMHC will acknowledge receipt of the gift on this form and return it to you so that you may comply with all IRS regulations.
- 3) If you have the stock certificates in your possession, send the unendorsed stock certificates and a signed stock power (available from your broker) *in separate envelopes* to RMHC. The gift is complete as of the postmark date of the later envelope.
- 4) If your broker holds the security for your account, instruct to electronically transfer—known as “DTC”—the securities to RMHC’s account, using this information:

Account Name: Ronald McDonald House Charities of Western Washington & Alaska

Firm: The Bank of New York Mellon
1201 Third Ave Suite 5010
Seattle, WA 98101
206-743-0327

DTC Number: 8275

Account Number: 10380357900

Attention: Jeff Moseley, CFA, Associate Wealth Manager
Jeffrey.moseley@bnymellon.com or 206-664-8822

Heather Bauer, Director of Annual Giving
Ronald McDonald House Charities of W. WA & AK
Heather@rmhcseattle.org or 206-838-0614

Tax ID Number: 91-1061043

- 5) If you have questions, contact Heather at Heather@rmhcseattle.org or 206-838-0620

* Information is as current as of July 2022.