



Planned Parenthood of Southwestern Oregon

## GIFTS OF STOCK

Many donors choose to contribute to Planned Parenthood of Southwestern Oregon (PPSO) by making a gift of stock rather than a contribution of cash as it may be more advantageous tax-wise. This is because a gift of appreciated securities generally provides a two-fold tax advantage. First, you may be able to avoid paying capital gains tax on the increase in the value of the stock or mutual funds. Second, you may receive a federal income-tax deduction for the full fair-market value of the securities at the time of the gift.

And it's easy to make a stock or mutual fund gift to PPSO!

### ① Have your broker transfer your gift of securities to PPSO's broker:

*Broker Information:*

Vanguard Institutional Advisory Services  
15111 N Pima Rd | Mailport AP34 | Scottsdale, AZ 85260  
(480) 713-8038

*Account Information:*

DTC #: 0062  
Brokerage #: 29755585  
Account Name: Planned Parenthood of Southwestern Oregon  
Tax ID #: 93-0573822

### ② Ensure that you are properly credited and acknowledged for your gift by providing the following information to the PPSO Development Department by phone, fax, email, or mail:

Full Name  
Mailing Address  
Preferred Phone #  
Name of Stock or Mutual Fund  
# of Shares

Ashley Petsch, Interim Director of Development  
[ashley.petsch@ppsworegon.org](mailto:ashley.petsch@ppsworegon.org)  
(541) 246-1019 phone

Brittney Nestle, Development Associate  
[brittney.nestle@ppsworegon.org](mailto:brittney.nestle@ppsworegon.org)  
(541) 246-1016 phone

**Planned Parenthood of Southwestern Oregon (PPSO)**  
**3975 Franklin Blvd | Eugene, OR 97403 | (541) 342-6088 fax**

*Please note that this information should not be construed as legal or tax advice. Please contact your own accountant, attorney, or tax advisor for assistance regarding stock or mutual fund gifts you may be considering.*

*Gifts must be received by December 31 to qualify for a tax deduction in the same calendar year.*