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  Brittney Nestle, Development Associate
   ashley.petsch@ppsworegon.org  brittney.nestle@ppsworegon.org
   (541) 246-1019 phone  (541) 246-1016 phone

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.