

## Donate Stock

Northeast Kingdom Human Services accepts donations of appreciated stocks, bonds, or mutual funds. When you make a gift to NKHS by transferring stocks into our brokerage account, we do not receive any information that identifies you as the donor. To ensure that you receive proper tax acknowledgement of your gift, please contact Kate Olney, Director of Development at [kolney@nkhs.net](mailto:kolney@nkhs.net) or by calling 406-438-5018 prior to transferring your gift.

Transferring your held stock to our brokerage account, rather than selling it yourself and giving NKHS the proceeds, is necessary to avoid capital gains tax. Once securities are received, NKHS immediately sells your securities and uses the proceeds for its vital programs, and you receive gift acknowledgement and avoid capital gains tax.

### Benefits of Stock Gifts

- Immediate income tax deduction for the fair market value of the securities on the date of transfer, no matter what you originally paid for them.
- You pay no capital gains tax on the securities you donate.
- You can direct your gift to a specific fund or purpose.

Securities must be received in the Northeast Kingdom Human Services, Inc. (NKHS) brokerage account via electronic transfer on or before June 30 to be recorded in the current fiscal year, or December 31 to ensure your gift is tax-deductible in the calendar year intended. We recommend that you consult your tax or financial professional for advice before making charitable donations.

### Stock Transfer Instructions

NKHS Tax ID#: 03-0212039

LPL Financial DTC#: 0075

NKHS Account #: 3393-2332

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#### Derby

181 Crawford Road  
PO Box 724, Newport, VT 05855  
802-334-6744 · Fax 802-334-7455  
Toll free 800-696-4979

**[nkhs.org](http://nkhs.org)**

#### St. Johnsbury

2225 Portland Street  
PO Box 368, St. Johnsbury, VT 05819  
802-748-3181 · Fax 802-748-0704  
Toll free 800-649-0118