

## How to donate stock to CAIR Foundation

Contributing stocks and securities are a great way to support CAIR Foundation and its mission.

When you transfer ownership of long-term holdings to CAIR, you receive a charitable deduction of their full market value and incur no capital gains tax (subject to IRS deduction limits).

When considering gifts of stock, we recommend you consult with your financial adviser and tax professional.

Please follow this procedure for giving:

**Step 1) Let CAIR Know.** Please alert us in advance about the security and number of shares you plan to give so we can acknowledge your gift for income tax purposes and ensure our broker will accept delivery of your gift. Please email CAIR at [donate@cair.com](mailto:donate@cair.com) with the following information:

1. Your contact information: name, address, phone, and email
2. Security name(s) and number of shares
3. Name of financial firm holding the shares

Please note, in rare cases a mutual funds or ETF may not be accepted by our broker. By alerting us of the gift, we can confirm whether your mutual fund or ETF share can be donated to us in-kind.

**STEP 2) Inform your broker.** Provide the information below to your broker in order to make a securities gift to the CAIR Foundation.

**DTC# 0226 – Fidelity Investments**

**Account # 636-231401, FBO CAIR Foundation**