



Make a Tax-Wise Gift Using Appreciated Securities

Donating appreciated stocks or mutual funds is a smart way to make a meaningful difference in the lives of kids, seniors, families and veterans throughout the three rivers region.

Donating appreciated securities is simple and may provide you with immediate tax benefits. You may be able to receive a tax deduction based on the fair market value and eliminate paying long-term capital gains tax. Follow the easy steps below to make a gift of appreciated securities.

Step 1 - Initiate the Transfer

Contact your broker or financial advisor and provide the following transfer information for the Food Bank.

Brokerage Information:

Charles Schwab & Co. Inc.
P.O. Box 628291
Orlando, FL 32862-8291
1-800-435-4000

Account number: 8105-0844

DTC: #0164

Tax ID number: 25-1420599

Step 2 - Inform the Food Bank

Let us know the transfer has been initiated by filling out our online form at pittsburghfoodbank.org/notify or by sending us a letter with donor name, transfer date, number of shares and ticker symbol to: 1 N. Linden Street, Duquesne, PA 15110.

PLEASE NOTE: Donations of appreciated securities arrive at our brokerage account without donor information, informing us of the transfer ensures that the gift is attributed correctly.

Step 3 - Receive Acknowledgment

Once the transfer has been received, it will be sold. If donor information is provided, a written acknowledgment letter will be mailed to the donor. The acknowledgment letter will include the date of the donation and name and number of shares. We do not include a value of the gift. Please consult a financial advisor to determine the donation value for tax purposes.



Let's Connect!

Liz McFarlin-Marciak
Director of Major & Planned Giving

I'm available to work with you and your professional advisor(s) on smart ways to give that can help achieve lasting solutions to hunger and its root causes in the three rivers region.

Contact me at **412-745-0534** or Imm@pittsburghfoodbank.org today.

1 N Linden St. Duquesne, PA 15110
412.460.3663 • pittsburghfoodbank.org

This information is not intended to provide legal or tax advice and is not a substitute for the advice or services of an attorney or tax advisor.

