



# U.P. Land Conservancy

2208 US Hwy 41 South, Marquette, MI 49855

Phone (906) 225-8067

*Land Today for Life Tomorrow®*

## **Thank you for your interest in making a charitable gift to the Upper Peninsula Land Conservancy in the form of a stock transfer!**

For stocks held in brokerage accounts, your broker can assist you in making a gift of stock via direct transfer to UPLC. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save brokerage fees because you are transferring ownership rather than selling the stock. The UPLC does not give legal, tax or accounting advice. Please consult your tax professional for specifics on your tax deduction options.

If you would like to make a donation of stock to the Upper Peninsula Land Conservancy, (EIN #383467972), please note the following:

- **Brokerage house:** Edward Jones
- **Account Name:** UP Land Conservancy
- **Account Number:** 224 14407-1-4
- **Financial Advisor:** Douglas Gordon
- **Telephone Number:** (906)226-2852
- **DTC Number:** 0057
- **Reference:** Donor Name *(Including a name will ensure the gift is properly acknowledged)*

*\*\*Please note: for mutual funds gifts, or for gifts of stock not held in a brokerage account, please contact UPLC's Financial Advisor listed above\*\**

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*Please complete and return the rest of this form to receive your tax acknowledgement letter.*