



Giving a Gift of Securities to Willow House

Thank you for your interest in making a gift of stock, bonds, or other securities to Willow House. By donating appreciated securities, you can avoid paying capital gains tax and thus make a larger charitable contribution.

If you have any questions throughout the process, please call us at (847) 236-9300.

Please note if your broker sells the securities and sends Willow House a check for the proceeds, we are required to consider this a gift of cash rather than a gift of securities, and as such, you will be liable for any capital gains taxes on the appreciation of the securities.

Please follow the instructions below when making a gift of securities to Willow House:

Ask your broker to include the following information when the securities are transferred

- Your name and address
- Purpose of the gift
- Willow House Charles Schwab & Co. Information: DTC # 0164 and Acct # 26067195
- Name and phone number of your broker

Finally, it may be helpful for you to understand how Willow House calculates the gift value for securities transactions:

- All gifts of securities are recorded at the average of the high and low prices on the day the securities are received at Willow House's account.
- If Willow House sells the securities, neither the price of the securities at the time of the sale, nor the broker's commission on the sale, will affect the gift date or the gift value.

On behalf of the grieving children and families of Willow House, thank you for your support!

Willow House Tax ID#: 36-4236306