



One of the most tax-efficient ways to give!

The two key advantages:

1. Any long-term appreciated stock with unrealized gains (meaning they were purchased over a year ago, and have a current value greater than their original cost) may be donated to a public charity like Bridle Up Hope and a tax deduction taken for the full fair market value of the securities — up to 30% of the donor's adjusted gross income.
2. Since the securities are donated rather than sold, capital gains taxes from selling the securities no longer apply. The more appreciation the securities have, the greater the tax savings will be.

If you have questions on donating stock, please contact Dani Palmer (dani@bridleuphope.org) or Nicole Holgreen (nicole@bridleuphope.org).

Gifts of Stock can be directed to

Brokerage/Receiving Firm Name: LPL Financial
Receiving Firm DTC Number: 0075
Receiving Account Name: The Rachel Covey Foundation dba Bridle Up Hope
Receiving Account Number: 5251-7676
Federal Tax ID EIN: 46-1791738

Please provide the following (for Bridle Up Hope's records)

Delivering Firm Name: (ex. NFS, Charles Schwab, Merrill Lynch, etc.)
Delivering Firm DTC Number:
Name/Symbol and Quantity of position(s) donated: (ex. 10 Shares of BRKB)
Date or expected date of donation:
Donation Purpose:
Donor Name(s):
Donor Mailing Address:

Information provided is general and educational in nature and relates to taxation only at the federal level. It is not intended to be, and should not be construed as, legal or tax advice. Bridle Up Hope: The Rachel Covey Foundation does not provide investment, legal or tax advice. Consult an attorney or tax advisor regarding your specific legal or tax situation.