



## Securities Donation Information

When you donate appreciated stock or mutual fund shares instead of cash you will receive charitable deductions at full, fair market value while reducing capital gains impact.

- Contact your brokerage firm and sign an **Authorization for Transfer of Stock to HomeFirst Services of Santa Clara County's account with UBS Financial Services.**

Contact: **Debbie Mazzulla**, Wealth Management Associate

UBS Financial Services

50- W. San Fernando Street

San Jose, Ca 95113-2429

Phone: 408-282-8411

Email: [Debbie.Mazzulla@ubs.com](mailto:Debbie.Mazzulla@ubs.com)

Account Name: HomeFirst Services of Santa Clara County

FEIN #: 94-2684272

Brokerage Acct #: **SJ 41634 BG**

DTC #: **0221**

- Debbie Mazzulla will contact HomeFirst CFO Art Stein ([astein@homefirstscc.org](mailto:astein@homefirstscc.org)) with an electronic copy to CDO B.Michael McFarland ([bmcfarland@homefirstscc.org](mailto:bmcfarland@homefirstscc.org)) after notification on transfer of shares. The charitable value of your gift is determined by the average of the high and low stock price on the actual date of transfer.
- Art will then provide sales instructions once we have the stock in our account and the Development Department will acknowledge receipt of the gift with information relevant to tax deductibility.