



GIVE A GIFT OF STOCK

Gifts of publicly traded securities that have appreciated in value allow you to avoid capital gains taxes while also receiving a tax deduction for your gift. Plus, you can specify an area that you would like the proceeds to support or have them contributed to the area of most need. HAVEN benefits by selling the stock without paying taxes on the gain, and you benefit from making a contribution that would be larger than what you might have been able to donate in cash.

Instructions

The following are the DTC instructions for HAVEN for transfer of stock to our broker, Chase Bank.

DTC#: 0352
Account Number: 739-50728
Account Title: HAVEN, Inc.
Reference: (Name of Donor)

For assistance from Chase contact:
Mark Maddock
mark.o.maddock@jpmorggan.com
734-697-1660

Before a transfer of stock is made, we ask that you please notify us at development@haven-oakland.org with the name of the stock(s), number of shares, and gift designations(s) so we may monitor our account for the expected transfer and process your gift accurately.

Please note that these instructions are applicable to benefit any of HAVEN's programs.

If you intend to transfer mutual fund shares to HAVEN, please contact us ahead of time with the mutual fund name and symbol. Certain mutual funds are not transferable to HAVEN's bank account with Chase Bank and special accommodations may need to be made for your gift.

Note: Please **do not** use these instructions to fund gift annuities.

Valuation: For internal recognition purposes, the gift value is determined by the price on the date the shares are sold. HAVEN does not hold shares and will sell upon receiving. You will need to consult with your tax advisor to determine whether to use this value or another value for tax purposes. Please see IRS Publication 561 for additional details.

Contact

HAVEN Development Department
801 Vanguard Dr, Pontiac, MI 48341
development@haven-oakland.org
248-334-1284 ext. 344