



## Donating to MESA Foundation

Thank you for your interest in making a charitable gift to MESA Foundation. Make a bigger impact by donating long-term appreciated securities, including stock, bonds, and mutual funds. Compared with donating cash or selling your appreciated securities and contributing the after-tax proceeds, you may be able to increase your gift and your tax deduction. Not only do you benefit from an immediate income tax deduction for the fair market value, you also avoid capital gains tax.

If interested, please first consult your CPA/Tax advisor for a further understanding on how this may apply to you and your individual tax situation.

### How To:

- Provide the below instructions for stock donations to MESA Foundation to your financial advisor who will transfer the shares on your behalf
- Please be sure to have them email both the MESA Foundation and the receiving institution on the day the shares are sent via DTC. Email listed below.
- MESA Foundation will provide a donation letter to you

DTC #: 0221

For Credit to Account Number: MS 02143

For Credit to Account Name: MESA Foundation

Ticker and Number of Shares \_\_\_\_\_ Donor Name(s) (for  
charity's records & gift acknowledgement)

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**When sending gifts of stock, please email Casey Rader at [casey.rader@ubs.com](mailto:casey.rader@ubs.com) to confirm the stock is in transit. The phone number is below**

Please note that MESA's minimum threshold for qualification as a donation of \$1,500 still applies, please inquire at [www.mesafoundation.org](http://www.mesafoundation.org) for further information

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Investment and advisory products and services are not FDIC insured, not made guaranteed and may lose value.