



Giving Appreciated Stock

Contributing a long-term appreciated stock to the NCPF offers you several advantages.

First, you are entitled to a charitable income tax deduction equal to the fair market value of the stock when the gift is made.

Second, gifts of appreciated stock are fully deductible up to 30 percent of your adjusted gross income for that year. Any excess of the 30 percent deduction can be carried forward up to five additional years.

Finally, you avoid the capital gains tax that you would have owed if you had sold the stock instead and used the proceeds from the sale to make your gift to NCPF.

How to Make a Gift of Stock to NCPF

Securities can be transferred electronically directly into the NCPF brokerage account at Smith Barney:

Smith Barney
700 Spring Forest Road, Suite 200
Raleigh, NC 27609

For transfer information, please call Frances Bobbie or John Allman at Smith Barney. They can be reached at (919) 877-2400. You can also call the NCPF for transfer information at (919) 847-2323.

Please note: Contributions will be calculated based on the average of the high and low stock prices for the date on which your gift is made (i.e., if transferred electronically, the gift date is the day in which the stocks leave your account).

If you wish to donate stock using stock certificates, please call the NCPF offices at (919) 847-2323 or email info@ncpsychoanalysis.org for special instructions.

Thank you.