



# NEW ENGLAND HISTORIC GENEALOGICAL SOCIETY

AmericanAncestors.org

## GIFTS OF APPRECIATED SECURITIES

Thank you for considering a gift to the New England Historic Genealogical Society. By contributing appreciated securities to NEHGS, you can potentially get two tax breaks by saving on income tax and capital gains tax too! Your tax deduction will be based on the mean market value of the securities on the day of transfer into the NEHGS account.

### **A gift of *publicly-traded securities* could be right for you if:**

- You own publicly-traded securities that you have owned for at least one year.
- Some of these securities have increased in value since you bought them.
- Some of these securities may provide you with little or no income.
- You would like to make a gift to New England Historic Genealogical Society.

**Please alert the NEHGS Development Office before transferring securities** and send the NEHGS either a copy of the broker's instructions or a letter of intent including the number of shares and gift date transfer. Please note that due to confidentiality protocols, the NEHGS Development Office often has no way of knowing who sent the security if we are not notified by either you or your broker. Prior to the stock transfer, please contact Ted MacMahon, Senior Gift Planning Officer, at [tmacmahon@nehgs.org](mailto:tmacmahon@nehgs.org). To have Ted call you at a convenient time for you, please go to [www.meetme.so/tedm](http://www.meetme.so/tedm).

### **Electronic Transfer of Securities**

Securities may be transferred electronically by your broker or trust advisor to Morgan Stanley Wealth Management. You may instruct your broker to "deliver free" with the following information:

- Morgan Stanley Wealth Management's number is DTC 0015
- The NEHGS account number is 707-119420
- The NEHGS federal tax number (EIN#) is 04-2104757

The NEHGS contact at Morgan Stanley Wealth Management is Tom Bernazani (617-570-9257).

Please contact us for confidential information on gift strategies that can help you support New England Historic Genealogical Society and provide significant benefits to you and your family.

### **Ted MacMahon**

New England Historic Genealogical Society  
Senior Gift Planning Officer

[tmacmahon@nehgs.org](mailto:tmacmahon@nehgs.org)

To have Ted call you at a convenient time for you, please go to [www.meetme.so/tedm](http://www.meetme.so/tedm).