



American Ancestors

by NEW ENGLAND HISTORIC GENEALOGICAL SOCIETY

GIFTS OF APPRECIATED SECURITIES

Thank you for considering a gift to American Ancestors / New England Historic Genealogical Society (NEHGS). By contributing appreciated stocks, bonds, exchange-traded funds (ETFs), and/or mutual funds to American Ancestors/NEHGS, you can potentially benefit from two tax breaks, saving on income tax and capital gains tax as well. Your tax deduction will be based on the average value of the securities on the day of the transfer into the American Ancestors/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.
- The securities have increased in value since you bought them.
- The securities may provide you with little or no income.
- You would like to further the mission of American Ancestors/NEHGS.

Please alert American Ancestors/NEHGS before transferring securities, indicating what you plan to contribute. Note that, due to confidentiality protocols, American Ancestors/NEHGS often has no way of identifying the sender of the security if we are not notified in advance. Before initiating a transfer of securities, please contact Ted MacMahon, Assistant Vice President, at tmacmahon@nehgs.org or 617-549-0300.

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 with the following information:

- Morgan Stanley Wealth Management's number is DTC 0015
- The American Ancestors/NEHGS account number is 625-119420
- The American Ancestors/NEHGS federal tax number (EIN#) is 04-2104757

The American Ancestors/NEHGS contact at Morgan Stanley Wealth Management is Thomas B. Ames, who can be reached at Thomas.Ames@morganstanley.com.

Please contact us for confidential information on gift strategies that can help you support American Ancestors/NEHGS and provide significant benefits to you and your family.

Ted MacMahon, CFRE

Assistant Vice President

American Ancestors / New England Historic Genealogical Society

99-101 Newbury Street, Boston, MA 02116

tmacmahon@nehgs.org, 617-549-0300

To schedule a phone call with Ted, please go to www.meetme.so/tedm.

THANK YOU!