



# American Ancestors®

A NATIONAL CENTER FOR FAMILY HISTORY, HERITAGE & CULTURE

## GIFTS OF APPRECIATED SECURITIES

Thank you for considering a gift to American Ancestors. By contributing appreciated stocks, bonds, exchange-traded funds (ETFs), and/or mutual funds to American Ancestors, 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 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.

### **Please alert American Ancestors before transferring securities, indicating what you plan to contribute.**

Note that, due to confidentiality protocols, American Ancestors 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, Vice President for Gift Planning, at [ted.macmahon@americanancestors.org](mailto:ted.macmahon@americanancestors.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 account number is 625-119420
- The American Ancestors federal tax number (EIN#) is 04-2104757

The American Ancestors contact at Morgan Stanley Wealth Management is Ellis W. M. Tonissi, who can be reached at [Ellis.Tonissi@morganstanley.com](mailto:Ellis.Tonissi@morganstanley.com) or 212-903-7761.

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

### **Ted MacMahon, CFRE**

Vice President for Gift Planning

American Ancestors

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[ted.macmahon@americanancestors.org](mailto:ted.macmahon@americanancestors.org), 617-549-0300

To schedule a phone call with Ted, please go to [www.meetme.so/tedm](http://www.meetme.so/tedm).

## THANK YOU!