



American Ancestors[®]

A NATIONAL CENTER FOR FAMILY HISTORY, HERITAGE & CULTURE

GIFTS OF APPRECIATED SECURITIES

Note: The formal and legal name of American Ancestors is New England Historic Genealogical Society. Our brokerage account at Morgan Stanley needed to shorten this to “N.E. Historic Genealogical Soc.” which will be used in the instructions below so as not to cause any confusion with the transfer.

Thank you for considering a gift to N.E. Historic Genealogical Soc. By contributing appreciated stocks, bonds, exchange-traded funds (ETFs), and/or mutual funds to N.E. Historic Genealogical Soc., 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 N.E. Historic Genealogical Soc. 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 N.E. Historic Genealogical Soc.

Please alert N.E. Historic Genealogical Soc. before transferring securities, indicating what you plan to contribute. Note that, due to confidentiality protocols, N.E. Historic Genealogical Soc. 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 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 N.E. Historic Genealogical Soc. account number is 625-119420
- The N.E. Historic Genealogical Soc. federal tax number (EIN#) is 04-2104757

The N.E. Historic Genealogical Soc. contact at Morgan Stanley Wealth Management is Ellis W. M. Tonissi, who can be reached at Ellis.Tonissi@morganstanley.com or 212-903-7761.

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

Ted MacMahon, CFRE

Vice President for Gift Planning

N.E. Historic Genealogical Soc.

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

THANK YOU!