



Make a gift of stock

Giving a gift of appreciated stocks, bonds or mutual funds is another impactful way to support SHIM and may provide a greater tax benefit than giving cash.

Your donation of securities is eligible for a tax deduction and helps you avoid or reduce capital gains taxes and brokerage fees. For more information on potential tax advantages, please consult with your financial advisor. Gifts of securities can easily be made by asking your broker to arrange a transfer to SHIM's account at LPL Financial. Please provide your broker with the following information:

SHIM's Account Number: 5332-0006

at

LPL Financial
4707 Executive Drive
San Diego, CA 92121-3091

DTC# 0075

Phone: 412-308-2095

Fax: 412-308-2097

Instruct your broker/agent to contact Linda Lewis at least 24 hours prior to delivery:

Linda Lewis

SHIM's Director of Finance and Administration llewis@shimcares.org

412-854-9120 ext. 102