



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:

LPL Financial
4707 Executive Drive
San Diego, CA 92121-3091
Account Number: 5332-0006

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 or 412-854-9120 ext. 102