



The Benefits of Charitable Giving with Stock

If you are like most individuals, the value of your stock and other investments has grown over the years. Perhaps you are entering your retirement years and wondering how you can turn your highly appreciated asset into extra income.

You may also be concerned about the mounting capital gains taxes due. If you sell your stock in today's market, you will forfeit a portion of the proceeds to taxes and that means less cash for you. In short, you need a way to sell your stock and avoid capital gains.

If you identify with any of these situations, the solution is a charitable stock plan. A variety of charitable plans can help you achieve your goals for tax savings and even provide income.

Put Your Stock to Work and Leave a Legacy of Mental Wellness in Your Community!

Donating appreciated stocks, bonds or mutual funds is quick, simple and may provide you with significant tax benefits.

Step 1: In order for us to provide a proper receipt for your tax benefit, please complete our stock donation form. You can also email us at aconroy@mentalwellnesscenter.org or call 805-845-3298 to speak with the Mental Wellness Center Development & Communications Manager, Amanda Conroy.

Step 2: Send your broker the following stock transfer information. Please ask them to provide your full name with the stock transfer.

Mental Wellness Center

Tax ID: 95-1962659

Account #: 4GX160288

DTC number: 0443

Contact: Ryan Burnham

Tremblay Financial

Phone: (805) 569-1982

Fax: (805) 569-5767

Email: ryan@tremblayfinancial.com

Step 3: Mental Wellness Center will sell the stock and send a tax receipt using the contact information you provide. We are happy to honor requests for giving to remain private, but we cannot accept gifts without a name and valid contact information.