



Your not-for-profit hospice since 1977

CHARITABLE GIVING

Securities and Stocks

Benefits of Donating Securities and Stock

When you donate appreciated stock shares that you have owned for more than 12 months to Hospice of the Valley, you will:

- Receive a federal tax-itemized deduction of full present value.*
- Bypass federal capital gains (you will be required to pay capital gains if you sell your stock prior to donating).
- Help Hospice of the Valley continue to meet the special needs of the terminally ill and remain a leader in quality hospice care.

*For federal income tax purposes, including alternative minimum tax purposes, you can deduct the value of the securities on the date of your contribution. The net value of your contribution is the average between the high-and low-quoted selling price of the date that the securities passed from your control. Your gift will be acknowledged in writing by Hospice of the Valley for tax purposes.

Please consult your tax advisor for more details regarding tax consequences of donating securities and stock.

How to Donate Securities and Stock

If your shares are held at your brokerage, financial institution or department trust:

- Please notify your broker or financial institution of the name and quantity of shares you wish to donate. (You may use the following transfer form.)
- Your shares may be electronically transferred to Hospice of the Valley's Account: Charles Schwab, DTC Clearing 0164, Code 40, Account No. 9012-1927.

If your shares are held by you personally, please call the Fund Development Dept. at Hospice of the Valley, and we will help you transfer your securities.

Securities and Stock Transfer Form

I _____ request that _____ shares of _____ securities be transferred from _____ to Hospice of the Valley's Charles Schwab Account, DTC Clearing 0164, Code 40, Account No. 9012-1927.

Please notify Hospice of the Valley of your gift so we may properly acknowledge your contribution.

Hospice of the Valley
Fund Development Dept.
1510 E. Flower St.
Phoenix, AZ 85014
602.530.6992
602.636.5328 fax
funddevelopment@hov.org
hov.org

Our Money Comes from

- 89% Medicare
- 5% Insurance companies
- 2% Private pay
- 4% Fundraising and donations

Our Money Goes to

- 86% Program services
- 13% Management and general
- 1% Fundraising