



20 Dr. Marcus F. Wheatland Blvd.
Newport RI 02840
P 401.846.4828
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www.mlkccenter.org

Gifts of Securities

Gifts of stocks, bonds or mutual funds can be particularly beneficial for both you and the Dr. Martin Luther King, Jr. Community Center, potentially providing donor tax advantages of avoiding capital gains tax and allowing for larger gifts (and thus more benefit to the Center) than may be possible with cash giving.

As with any financial decision, please consult with your financial advisor or tax professional to determine if gifts of securities are appropriate for you.

INSTRUCTIONS FOR GIFTS OF STOCK:

- To insure proper credit and donor acknowledgement, please notify the Dr. Martin Luther King, Jr. Community Center of your impending stock transfer prior to initiating the transaction.
- Please also notify the Director of Development in writing how you would like your gift to be allocated (for example, the Annual Fund):

By Mail: Alyson F. Novick, Director of Development
Dr. Martin Luther King, Jr. Community Center
20 Dr. Marcus F. Wheatland Blvd.
Newport RI 02840

By email: anovick@mlkccenter.org

- The MLK Community Center will work with our agent (Charles Schwab) to handle the sale of your stock. After the stock sale is completed, you will receive an acknowledgement letter for your records. Please note: Gifts of securities are credited at market value on the date the Dr. Martin Luther King, Jr. Community Center gains control of the assets.

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| MLK's Brokerage Firm: | Charles Schwab |
| Agent: | Andrew J. Parsons, Investment Advisor Corrigan Financial, Inc. 747 Aquidneck Ave. Middletown, RI 02842-7265 |
| Phone: | 401-849-9313 |
| Fax: | 401-849-5508 |
| Email: | AParsons@corriganfinancialinc.com |
| DTC Number: | 0164 |
| Account Name: | Schwab One account of: Dr Martin Luther King Jr Community Center |
| Account Number: | 2956-3583 |

Thank you for supporting the MLK Community Center.