



MAKING A GIFT OF STOCKS AND BONDS to Tepeyac Leadership, Inc.

Donating appreciated securities, including stocks or bonds, is an easy and tax-effective way for you to make a gift to TLI. 1) Avoid paying capital gains tax on the sale of appreciated stock. 2) Receive a charitable income tax deduction. 3) Further the mission of TLI.

By electronic transfer – All gifts of stocks, bonds and mutual funds should be sent to:

DTC #: 8862
TLI Account #: 412-03454
Account Name: Tepeyac Leadership Inc.
TLI Tax ID #: 83-2789375

TLI Broker Information: Merrill Lynch, Pierce, Fenner & Smith Inc.
Contact: Fernando Marquez
Direct line: 480-773-9730

Please contact us to inform us what specific asset(s), how many shares, and when it will be transferred to our account.

By certified mail – If you hold securities in certificate form, you will need two envelopes separately to complete your gift. In the first envelope, place the unsigned stock certificate(s). In the other envelope, include a signed stock power for each certificate. You may obtain this power from your broker or bank. Please remember to use certified mail.

More on gifts of stocks and bonds

There are special rules for valuing a gift of stock. The value of a charitable gift of stock is determined by taking the mean between the high and low stock price on the date of the gift. Mutual fund shares are valued using the closing price for the fund on the date of the gift.

PRIVACY STATEMENT

This site is informational and educational in nature. It is not offering professional tax, legal, or accounting advice. For specific advice about the effect of any planning concept on your tax or financial situation or with your state, please consult a qualified professional advisor.

Thank you for your support of Tepeyac Leadership!

Tepeyac Leadership, Inc. is recognized by the IRS as an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Service Code. Contributions are tax-deductible to the extent allowed by law.