

Parks Foundation of Burlington, Inc. Stock and Mutual Fund Donation Instructions

For gifts to the Parks Foundation of Burlington, Inc. you can donate stock or mutual fund shares. This may be beneficial as you can report the full market value of appreciated shares as a donation deduction but do not pay tax on the built-in gain. Consult your financial or investment advisor for questions about your particular situation.

Please follow the instructions below to deposit shares directly into our Vanguard brokerage account.

For shares held in an existing brokerage account transfer shares to:

Vanguard Brokerage Services

DTC #: 0062

Acct#: 38433897

Account Name: Parks Foundation of Burlington, Inc.

If you have any questions regarding the transfer of shares please contact Gordon MacFarland, Treasurer. Mobile: 802-318-6277. Email: gordon.macfarland@gmail.com

For gifts of stock or mutual funds deposited directly to our brokerage account, please complete this form so we know how to apply your gift. This form may be sent to Parks Foundation of Burlington, 645 Pine Street, Burlington, VT 05401 or emailed to gordon.macfarland@gmail.com.

Your name:

Your brokerage company:

Date of donation and stocks/mutual funds donated:

Designated project or general fund if no specific project:

Would you prefer your gift be reported as anonymous in our annual report?

We will confirm the amount of donation based on the average of the high and low market value of the shares on the day received into our account, which is the method prescribed by the IRS.

THANK YOU!!