



CARDINAL HAYES HIGH SCHOOL

“UP HAYES AND ALL ITS LOYAL MEN!”

How to Make a Gift of Stock or Other Securities to Cardinal Hayes High School

To qualify for 2015 tax deduction, stock gifts must be transferred into the Cardinal & Gold Fund's stock account before **5 p.m. on Thursday, December 31, 2015**. **In order to receive full tax deduction, please complete and send this form to:**

Cardinal Hayes High School
Attn: Thomas Fike
650 Grand Concourse
Bronx, NY 10451

To ensure that your gift is processed accurately and efficiently, Cardinal Hayes requires the following information:

Donor Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Tel: _____ E-mail: _____

Graduation Year: _____ Name of Stock (SYMBOL) _____

Date of Transfer: _____ Number of Shares _____

Employment Information (Optional): _____

Other Comments/Restrictions: _____

Brokerage Firm Contact Person: _____

Brokerage Firm Telephone Number: _____

The Cardinal and Gold Fund uses the following clearinghouse for all gifts of stock and securities:

Pershing
DTC 0443
For the account of The Cardinal and Gold Fund
Account: P25-006167

Please be advised that the legal date of the gift is the day the Fund assumes ownership of the security, not the day the securities were sent.

Cardinal and Gold Fund's employer identification number is 13-3691813

Save on Taxes while Helping Cardinal Hayes

Any long-term appreciated securities with unrealized gains may be donated to a public charity and a tax deduction taken for the full fair market value of the securities — up to 30% of the donor's adjusted gross income.

- Any long-term appreciated securities with unrealized gains (meaning they were purchased over a year ago, and have a current value greater than their original cost) may be donated to a public charity and a tax deduction taken for the full fair market value of the securities — up to 30% of the donor's adjusted gross income.
- Since the securities are donated rather than sold, capital gains taxes from selling the securities no longer apply. The more appreciation the securities have, the greater the tax savings will be.

	Donate Stock: Contribute securities directly to charity	Donate Cash: Sell securities and donate proceeds
Current fair market value of securities	\$50,000	\$50,000
Capital gains and Medicare surtax paid (23.8%)	\$0	\$7,140
Charitable Contribution/Charitable Deduction ³	\$50,000	\$42,860
Value of Charitable Deduction Less Capital Gain Taxes Paid (Assumes donor is in the 39.6% federal income tax bracket)	\$19,800	\$9,833

** For illustrative purposes only – please contact your financial advisor for accuracy

Double Your Gift To Hayes

Refer to the attachment for a list of companies known to give matching gifts. Please ask your HR representative for a matching gift form.

UP HAYES!