



Giving Appreciated Securities

You will receive full tax deduction for the market value of securities given. This avoids any capital gains tax you would incur in selling appreciated securities as long as they have been held for one year.

How to give securities held by your broker:

1. Instruct broker in writing to transfer a specific gift amount to Blue Water Baltimore, Inc.
2. Instruct broker to contact the Blue Water Baltimore upon arrival of your letter for specific DTC instructions.

Blue Water Baltimore's Federal Tax ID #:	52- 1420138
Blue Water Baltimore's Acct. # at Merrill Lynch	2AY02126
DTC #	5198

Broker: Lauren Kaufman, lauren.kaufman@ml.com

3. Send a copy of your letter to Blue Water Baltimore (address below).

How to give securities held in your possession:

1. Mail unendorsed certificates to Blue Water Baltimore (address below) with a short letter of intent.
2. Obtain a stock power from your broker with your signature guaranteed.
3. Under separate cover, mail the stock power to Blue Water Baltimore with a copy of your original letter of intent.

Giving Securities while Retaining Life Income

You may also make a gift of securities through a trust arrangement and receive income during your lifetime or the lifetime of your designated beneficiary. Consult your tax and financial advisors to determine which plan is best for you.

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