

## PRISON ENTREPRENEURSHIP PROGRAM STOCK DONATION FORM

Thank you for considering a gift of stock to the Prison Entrepreneurship Program. Donating shares of appreciated securities is an excellent means of providing a tax-deductible donation that offers some significant advantages:

- Avoiding long term capital gains tax on the sale of appreciated assets (*please consult with your tax advisor*).
- Easy transfer process...Simply notify your broker and we handle it from there;
- No concern on timing; your deduction is equivalent to the value of the stock on the day that you donated it (*not on the date that PEP sells it*).

### To make a gift of stock:

1) Please fill out the information below and contact your broker to initiate a stock donation via electronic DTC transfer. Your broker will need the following information to transfer stock directly to the Prison Entrepreneurship Program.

Prison Entrepreneurship Program Brokerage: eTrade (DTC#)

Account Number:

Account Name: Prison Entrepreneurship Program (Federal Tax ID: 20-1384253)

eTrade Broker:

2) Please contact Prison Entrepreneurship Program to let us know that you are making this gift so that we can confirm receipt. This is particularly important since we DO NOT receive the name of the donor in the electronic transfer. Please email this form to PEP: [thamilton@pep.org](mailto:thamilton@pep.org)

3) Please call (832) 767-0928 for additional information or to confirm receipt of this form and/or your gift.

### DONOR INFORMATION

Name of Donor(s): \_\_\_\_\_

Address, City, State, Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Donor(s) Signature: \_\_\_\_\_

Gift Designation: \_\_\_\_\_

(will be directed to support the highest priority if left blank)

### STOCK DONATION / BROKERAGE INFORMATION

Date of Transfer \_\_\_\_\_ Approximate Dollar Value \_\_\_\_\_

Name of Security: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

Brokerage Firm: \_\_\_\_\_

Broker Name: \_\_\_\_\_ Phone: \_\_\_\_\_