



# Clearwater Camp Foundation

## *Spanning the Generations*

### **HOW TO CONTRIBUTE SECURITIES TO CLEARWATER CAMP FOUNDATION, INC.**

A donation of appreciated securities can generate substantial benefits for the Donor as well as for the Foundation. For the Donor the income tax deduction available is the current market value of the securities rather than its original cost to you. You will pay no capital gains tax on the difference between the original cost (the “basis”) and the current market value. Neither will Clearwater Camp Foundation, Inc., for it is a non-profit, 501(c)(3) corporation.

There are two principal ways to transfer securities to Clearwater Camp Foundation, Inc.: by electronic transfer, or by mailing the physical stock certificates.

**Electronic transfer** is the most popular and most efficient way to transfer securities to the Foundation. It can be used when your stock is held in a brokerage account, where you don’t have physical possession of the stock certificates. Instead, the stock is held in so-called “street name”, and you receive a statement showing your ownership of the stock very similar to a bank statement. An electronic transfer is much more convenient and less costly than the physical transfer of shares.

If your stock is held by a broker, notify the broker that you wish to make a gift of securities to Clearwater Camp Foundation, Inc. Your broker will need written authorization from you before making the transfer. Be sure to identify the name of the stock that you want to transfer and the number of shares. Attached is a [stock transfer authorization form](#) you can use to inform your broker.

Once you have authorized the transfer, *please fax a copy of your letter of authorization to the Treasurer of Clearwater Camp Foundation, Inc. at 414-332-9667, in order that the Foundation can track the delivery and receipt of shares.*

If your stock is not held at a broker, and instead you have **physical possession** of the certificates, you will need to mail the certificates with a cover letter and an executed stock power form to the Foundation's broker.

Attached are a sample letter to use for transfer of stock held by the donor in physical (certificate) form, and a blank stock power form. In one envelope send this letter together with the unendorsed stock certificate(s) via registered mail to the broker for Clearwater Camp Foundation, Inc., (Edward Jones, at Madison, NJ). *Please send Clearwater Camp Foundation, Inc. a copy of the letter to alert us to track the receipt of shares.*

In a separate envelope mail the signed stock power form to Edward Jones at the same address. The stock power should be signed in blank—meaning that no other information should be entered on the stock power form other than the signature(s), which should exactly match the name(s) appearing on the stock certificate. In the case of a gift of stock of more than one company, a separate stock power should be signed for each company. On the other hand, multiple certificates for the same company require only one stock power.

Whether you send securities electronically or physically, it is the Foundation's policy not to hold on to these. As soon as practicable after receiving your gift the Foundation's broker will liquidate (sell) the securities. The gross proceeds of sale (before brokerage fees) will be recorded as the value of your contribution to the Foundation. However, for your tax purposes the gift will normally be valued using the average of the opening and closing prices of the shares on the day of receipt. Because of market fluctuations this value may not be exactly the same as the value realized.

You will receive an acknowledgment letter from the Foundation that will include the gift date, the gift description (e.g., 100 shares of ABC Corporation) and the value of your gift recorded by the Foundation as well as the value of the gift for your tax purposes. (Nevertheless, please consult your financial/tax advisor for guidance on your personal tax circumstances and assistance with the I.R.S. *Form 8283: Noncash Charitable Contributions.*)

Should you have any questions, please do not hesitate to contact either the Foundation's Treasurer, Ian Lambert at 414-962-9237 or [ilambert@ameritech.net](mailto:ilambert@ameritech.net), or our broker: Andrew Boles or Robin Richmond at Edward Jones, 800-401-2377.

# STOCK TRANSFER AUTHORIZATION



Clearwater Camp Foundation  
*Spanning the Generations*

7490 Clearwater Camp Road  
Minocqua, WI 54548

## PERSONAL INFORMATION:

Name(s) \_\_\_\_\_  
Mailing Address \_\_\_\_\_  
Phone Number (with area code) \_\_\_\_\_ Email \_\_\_\_\_

## STOCK INFORMATION (Donor's transfer agent or broker)

Name of Firm/Fund \_\_\_\_\_  
Contact Name \_\_\_\_\_ Phone Number \_\_\_\_\_  
Your Account Name (if different from above) \_\_\_\_\_

## DELIVERY INSTRUCTIONS

*For more information contact Andrew Boles or Robin Richmond at Edward Jones 800-401-2377.*

Please deliver the following assets:

Company Name and/or Symbol \_\_\_\_\_

Number of Shares \_\_\_\_\_

TO: **Edward Jones** (Tax ID#: 43-0345811)

Via DTC-Clearing Number: 0057

For Further Benefit of **Clearwater Camp Foundation, Inc.**,

Account #313-08831-1-3

SIGNATURE(s) \_\_\_\_\_

*(Must be signed by all account holders)*

Date \_\_\_\_\_

## DONOR MAILING INSTRUCTIONS:

**Original To:** Donor's Transfer Agent (Broker)

**Copy To:** Treasurer, Clearwater Camp Foundation, Inc.

**PLEASE FAX THIS FORM TO 414-332-9667 SO THAT THE FOUNDATION  
MAY TRACK THE RECEIPT OF SHARES**

# FORM OF LETTER TO USE TO TRANSFER PHYSICAL STOCK CERTIFICATES

Edward Jones  
Attn: Andrew Boles  
Two Shunpike Road Suite 32  
Madison, NJ 07940  
[tel: 800-401-2377]

Date

Dear Sir:

Enclosed is/are (a) certificate(s) for (number) shares of (name of company) stock, which I/we am/are donating to **Clearwater Camp Foundation, Inc., at Edward Jones Account # 313-08831-1-3.**

Under separate cover, I/we am/are sending a signed stock power to transfer the stock.

Please acknowledge receipt of these securities.

Sincerely,

Signature(s)  
Name of Donor(s)  
Enclosure: Stock Certificate(s)

Copy:

Treasurer, Clearwater Camp Foundation, Inc.  
7490 Clearwater Camp Road  
Minocqua, WI 54548

EdwardJones

Account Number: 313-08831 Destination: SECURITY RECEIVE
Customer: CLEARWATER CAMP FOUNDATION, INC. IR Number: 313033
Date: \_\_\_\_\_

IRREVOCABLE STOCK OR BOND POWER

Do not complete this portion:

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign and transfer to
\_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_ shares of \_\_\_\_\_ stock of \_\_\_\_\_
represented by the Certificate(s) No(s) \_\_\_\_\_
\_\_\_\_\_ inclusive,
standing in the name of the undersigned on the books of said Company.
\_\_\_\_\_ bonds of \_\_\_\_\_
in the principal amount of \$ \_\_\_\_\_, No(s) \_\_\_\_\_
\_\_\_\_\_ inclusive,
standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint EdwardJones attorney to transfer said stock or bond(s), as the case may be, on the books of said Company, with full power of substitution in the premises.

Dated \_\_\_\_\_

SIGNATURE OF OWNER

SIGNATURE OF CO-OWNER

SIGNATURE GUARANTEED