



## How to Make a Tax-deductible Gift of Stock to Worldwatch Institute

Beside a direct cash donation, donating securities that have been held for more than one year and have appreciated in value can be a highly tax-effective way to make a significant gift to the Institute. The process is simple and straightforward.

For tax payers that itemize deductions, you will usually be able to deduct the full-market value of securities on the day they are transferred. You would also pay no capital gains on the stock appreciation. The tax deduction can be used towards up to 30% of your adjusted gross income, and any excess may be carried over for use in future tax years.

### To donate securities being held by a brokerage firm:

Tell your broker that you wish to donate the securities to Worldwatch Institute and instruct that they be transferred to:

- Wells Fargo Advisors
- For the benefit of: Worldwatch Institute
- Account number: 87716852
- DTC routing number: 141

If you have questions about the transfer process, you may contact our broker William R. Manch, CFP Wells Fargo Advisors at 202-861-4479.

**IMPORTANT:** When you have given these instructions for transfer to your broker, please notify us at [donate@worldwatch.org](mailto:donate@worldwatch.org) and provide the following:

- Number of shares you are giving
- Company in which stock is held
- Date of expected transaction  
(e.g. 50 shares in company XYZ transferred December 31, 2017)

This information will help us to fully and accurately acknowledge your gift with a tax-deductible receipt.

Thank you for considering a gift of stock to Worldwatch. We recommend you discuss your gift intentions with your financial, legal or tax advisor.

*The information provided in this document is for general information purposes only, and does not constitute legal, tax or investment advice*