

Gifts of Stocks

Please consider a gift of appreciated stock or making a Qualified Charitable Distribution Gift from your Individual Retirement Account. Both can be tax efficient ways of making a charitable contribution.

If you are considering a gift of appreciated stock, please note the following:

- If the shares are currently held in an account, you will need to contact the custodian of that account and identify the specific shares you want to donate, provide them with the Visiting Nurse Association's Gifting Account information and follow their procedures to complete the process.
- If you are in possession of the physical stock certificates, you are able to deposit them into the Visiting Nurse Association's Gift Account by completing a Stock Power form, which can be provide by the gift account's custodian.
- If you are considering a Qualified Charitable Distribution Gift from your Individual Retirement Account, please note the following:
- You must be 70 ½ or older and taking required minimum distributions from your Individual Retirement Account

Information on the Visiting Nurses Association's Gifting Account and custodian is as follows:

Visiting Nurse Association Gifting Account

DTC Number: 0361

Account Number: 4285-9243

Account Custodian:

D.A. Davidson & Co

450 Regency Parkway

Suite 400

Omaha, NE 68114

402-898-1700

Please Notify Visiting Nurse Association Personnel prior to making any gift.

Talk with your Tax Professional

Please consult with your tax or financial advisors to determine the best charitable giving strategies for you.