



We build strength, stability and self-reliance through shelter.

Thank you for your interest in making a charitable gift to Habitat for Humanity of Metro Louisville in the form of a Stock Transfer.

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to Habitat for Humanity of Metro Louisville. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. In general, your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. We suggest you consult with your tax advisor for complete information regarding the tax deductibility of your gift. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to Habitat for Humanity of Metro Louisville (Tax ID# 58-1735528), please note the following:

- Brokerage House: Baird, 4803 Olympia Park Plaza, Suite 4000, Louisville, KY 40241
- Account Name: Habitat for Humanity of Metro Louisville
- Account Number: 4284-3395
- Financial Advisor: Alex Davis
- Telephone Number: 502-420-1427
- E-mail: [AwDavis@RWBaird.com](mailto:AwDavis@RWBaird.com)
- Financial Advisor Assistant: Stephanie Clark
- Telephone Number: 502-420-1446
- E-mail: [SdClark@RWBaird.com](mailto:SdClark@RWBaird.com)
- DTC Number: 0547
- Please provide the Donor name, mailing address, type of stock and number of shares to ensure your gift is properly acknowledged.

**\*\*Please Note:** For mutual fund gifts or for gifts of stock not held in a brokerage account, please contact the Alex Davis at Baird at the number listed above.

If you have any questions or need additional information, please contact Tricia Burke, Habitat's Impact Giving Leader at 502.805.1657 or [tburke@louisvillehabitat.org](mailto:tburke@louisvillehabitat.org).

