



Securities

Thank you for considering a gift of securities in support of La Lumiere. Gifts of securities often confer significant tax benefits for a donor. For example, contributions of appreciated securities held for over a year are generally deductible at market value, regardless of what the donor paid for them; moreover, the capital gains tax is avoided through such a gift.

To Make a Gift of Securities

To notify La Lumiere of a gift of securities, please contact Brian Tonino with complete donor information (name, address, phone number), the name and type of securities to be gifted (public, private, restricted, mutual fund, etc.), the number of shares, and the date you intend to make the gift by phone at (219) 326-7450x100 or email htonino@lalumiere.org

DTC Transfer of Stock

To transfer securities to La Lumiere School via DTC, please notify your broker of the securities to be gifted and provide the following transfer instructions:

DTC #0164, Code 40

La Lumiere School Charles Schwab Account No. 2857-7394

Donor Name & Address: _____

La Lumiere School Federal ID 35-1085350

Acknowledgement of Gift

In order to promptly and accurately credit a security gift to the appropriate donor, it is essential that the transfer instructions include the donor's name and address. Without this information we are occasionally unable to identify the donors of certain securities.

As soon as a securities gift is received and matched to a donor, our development office sends an acknowledgment letter stating the nature of the gift, the gift valuation date, and the gift valuation amount. Additionally, a more personal acknowledgment will also be sent stating that no goods or services were exchanged for the security gift.