



## GIFT OF STOCK

Thank you for your interest in making a charitable gift to the Council on Legal Education Opportunity, Inc. (CLEO, Inc.) in the form of a Stock Transfer. Anyone interested in making a non-restrictive stock donation to CLEO, Inc. should read the following information and contact our office directly at 240-582-8600 for answers to any additional questions.

The policy of CLEO, Inc. is to sell all non-restrictive stocks and securities the organization receives upon completion of the stock transfer without exception. As soon as the stock transfer is completed, at that point, CLEO, Inc. will work with our investment professionals to execute an order to sell the donated stock immediately. The total amount received by CLEO, Inc. from the sale of the stock will be recorded as value of the gift for internal reporting purposes. In turn, CLEO, Inc. will provide you with an acknowledgment of thanks, transfer date, # of shares given, and stock name(s). Lastly, as is the case with all noncash contributions, it is your responsibility to assign a value to your gift for tax purposes in accordance IRS regulations.

For stock held in brokerage accounts, your broker should be able to assist in making a gift of stock via a direct transfer to CLEO, Inc. 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. 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. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

You can access the [Stock Transfer Form online by clicking here](#), then follow instructions to formalize and execute your charitable gift and be sure to fax or email the completed information to the contact information on the bottom of page two. Taking these steps, as-written, will promptly inform CLEO, Inc. of the proposed donation and ensure that you receive acknowledgment and receipt of your gift for tax purposes.

Please complete and return the second page of this form to receive your tax-acknowledgement.

**If you would like to make a donation of stock to CLEO, Inc. (tax ID# 45-4462410), please note the following:**

- ❖ Brokerage Firm: Raymond James & Associates
- ❖ DTC Number: 0725
- ❖ Account Name: Council on Legal Education Opportunity, Inc.
- ❖ Account Number: 535AM001
- ❖ Financial Advisor: The Washington Wealth Group
- ❖ Telephone Number: (202) 930-6011
- ❖ Reference: Donor Name (Including your name will help ensure proper acknowledgement of gift.)

### **Taxation Advice Prohibition Statement**

Please note that, under no circumstances can CLEO, Inc. provide tax advice as it pertains to either the deductibility of your gift of non-restrictive stock or recommendation of which stock(s) to donate. For guidance on this and other related topics, please consult your tax advisor or designated, investment professional.



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Please complete the information below to notify the Council on Legal Education Opportunity, Inc. (CLEO) of your gift and help ensure it is accurately processed and executed. The completed form can be faxed to 240-582-8605 or emailed to [cleo@cleoinc.org](mailto:cleo@cleoinc.org).

### Donor & Securities Information:

Name & Type of Securities (e.g.: XYZ common stock)	Security Symbol	# of Shares	Transfer Date
Donor Name (Individual/Corporation/Foundation)			
Donor Street Address			
Donor City / State / Zip			
Broker Name			
Broker Company / City / State			
Broker Contact / Telephone Number			
Donor Telephone / Email Address			
Donor 1 Signature	Date Signed	Donor 2 Signature (if applicable)	Date Signed

**Note** – All authorized account owners must sign this request. Individual accounts require one signature and joint accounts require the signature of both account holders.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your organization for more information on matching gift programs. In select instances, employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering CLEO, Inc. as the recipient of your charitable gift.

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