

# Donating Securities to the Academy

Thank you for including the Academy of Natural Sciences in your philanthropy. Gifts of appreciated stock transferred directly to the Academy may have extra tax savings. When securities have increased in value, you should normally give them directly rather than sell them and give from the proceeds. When owned for more than a year, securities to fund a gift can be considered a charitable deduction at full fair-market value, not just their original cost.

Giving in this way also enables you to bypass capital gains tax that would otherwise be due if the donated securities were sold. If you own securities that have decreased in value since you have owned them, consider selling those securities and making a charitable gift of the proceeds. In addition to a deduction for the cash contribution, you may claim a loss that is deductible for other taxable income.

See reverse side instructions for your broker to electronically transfer gifts of stock to the Academy of Natural Sciences. Please notify us by telephone or email prior to any stock transfer so that we are aware of the gift and can acknowledge it promptly.

If you or your broker has additional questions, please get in touch with the Academy's Executive Director of Development, **Caitlin K. O'Brien** at **215-405-5079** or **obrien@ansp.org**.

Thank you again for advancing the Academy's programs!

## Charitable Organization:

The Academy of Natural Sciences  
1900 Benjamin Franklin Parkway  
Philadelphia, PA 19103  
Federal I.D. # 23-1352000

## CONTACT

Caitlin K. O'Brien  
Executive Director of Development

**Email: [obrien@ansp.org](mailto:obrien@ansp.org)**

**Phone: 215-405-5079**

**Fax: 215-405-1541**

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## *Have Questions?*

We would be delighted to help answer any questions you may have about how you can support the Academy. To learn more, please contact our Office of Institutional Advancement at 215-299-1182 or [friends@ansp.org](mailto:friends@ansp.org). Thank you for your support!

The official registration and financial information of the Academy of Natural Sciences may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.

# Donating Securities to the Academy

## Electronic Securities Transfer Instructions

Below are instructions for your broker to electronically transfer gifts to the Academy of Natural Sciences. We ask that you notify us by telephone or email prior to any transfer so that we are aware of the gift and can acknowledge it in a timely manner.

### Transfers should be designated to:

DTC #0221  
UBS Financial Services, Inc.  
Account # B1 29371  
Academy of Natural Sciences

### UBS CONTACT

Carrie Cannon  
Financial Advisor

Phone: 610-832-3029

Fax: 855-247-4123

Email: [carrie.cannon@ubs.com](mailto:carrie.cannon@ubs.com)

## Electronic Bank Transfer Instructions

### Transfers should be designated to:

Bank Name: TD Bank, NA.  
Bank Address: 3735 Walnut Street,  
Philadelphia, PA, Zip Code 19104, U.S.A  
ACH Routing#: 011- 103- 093

### CREDIT TO:

Account Name: ANS Concentration

Account Number: 4265780746

Address: 1900 Benjamin Franklin Parkway,  
Philadelphia, PA, 19103

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