Thank you for your interest in making a charitable gift to Over-the-Rhine Community Housing (OTRCH) in the form of a Stock Transfer. **Please complete and return the second page of this form to receive your tax-acknowledgement.**

**For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to OTRCH.** 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.

If you would like to make a donation of stock to OTRCH (tax ID # 31-1272434), please note the following:

* Brokerage Firm: TD Ameritrade
* Account Name: OTRCH45202
* Account Number: 493422474
* DTC #: 0188
* Reference: Donor Name (Including your name will ensure the gift is properly acknowledged)

Please complete the information below to notify Over-the-Rhine Community Housing (OTRCH) of your gift and help ensure it is processed accurately. Please return this form to our mailing address, email the completed form to Katie Knipe, Fund Development Director at [kknipe@otrch.org](mailto:kknipe@otrch.org) or fax to 513-381-1314.

Donor & Securities Information

|  |  |
| --- | --- |
| Name & Type of Securities (ex. DELL common stock): |  |

|  |  |
| --- | --- |
| Security Symbol: |  |

|  |  |
| --- | --- |
| Number of Shares: |  |

|  |  |
| --- | --- |
| Transfer Date: |  |

|  |  |
| --- | --- |
| Donor Name (to be used in acknowledgements): |  |
| Donor Street Address: |  |
| Donor City, State & Zip: |  |

|  |  |
| --- | --- |
| Broker Name: |  |
| Broker Company/City/State: |  |
| Broker Contact/Telephone Number: |  |

|  |  |
| --- | --- |
| Donor Telephone/Email Address (to be used only if a question arises in the donation process): |  |

|  |  |
| --- | --- |
| Special Gift Designation (if any – ex. Capital Campaign or General Donation): |  |

🞎 I (we) wish to have our gift remain anonymous.

|  |  |
| --- | --- |
| Donor Signature: |  |

|  |  |
| --- | --- |
| Date Signed: |  |

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 company for more information on matching gift programs. 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 OTRCH as the recipient of your charitable gift! We’re deeply grateful for your generous support.*

If you have questions about your gift, please contact Katie Knipe, Fund Development Director at 513-381-1171 x 117 or [kknipe@otrch.org](mailto:kknipe@otrch.org).