

Making a Gift of Stock

Make a gift of stock and receive tax benefits while supporting inclusive playgrounds.

The simplest way to donate publicly traded stocks to Harper's Playground (HP) is to have your broker transfer shares electronically to HP's account.

Harper's Playground Brokerage Information

Brokerage: UBS Stock Account

Broker: Sara Richardson, sara.richardson@ubs.com; 503-248-1307

Account #: 7E-11027

DTC#: 0221

TAX ID#: 46-4451148

Once you've made the decision to transfer stock to Harper's Playground we ask that you notify us at 503-730-5445 or click [HERE](#) to email us directly.

****Notifying us that the transfer is occurring is very important; it is the only way we can credit you for the donation, as your name does not transfer with the stock.**

Harper's Playground will credit you for the value of the stock based on an average of the highest and lowest quoted selling prices on the day that your stock donation is received into our account. We make every effort to sell the stock immediately upon receipt. For your income tax purposes, your donation is completed on the day your broker transfers it to HP' account. Thus, you should always consult your tax advisor regarding the actual amount of your deduction and the date of the contribution.

Harper's Playground does not provide tax or legal advice. Please consult with your tax advisor on the tax implications of your charitable gifts.

a more inclusive world, one playground at a time. naturally.

