

## **Appreciated Assets and Securities**

Do you have property that has appreciated? Do you have stock that has increased in value? By giving these or other appreciated assets to Presbyterian Pan American School, you may avoid capital gains taxes while still qualifying for a current year tax deduction.

To make a stock transfer, please contact **Greg Hopper, Chief Financial Officer** (361-592-4307, ext. 1009) or [ghopper@ppas.org](mailto:ghopper@ppas.org) with security name and number of shares so it can be connected to the donor upon receipt.

Edward Jones handles all of Presbyterian Pan American School's transfers of stocks. The policy is to liquidate immediately upon receipt. The tax value will be the value of the stock when it is sold. Donor will receive a letter with the value of the stock on the day of the sale.

### **Special Instructions**

#### **DTC Eligible Securities:**

DTC#0057

FBO: Pan American Presbyt School

Jones Account: 783-10745-1-8

#### **Wiring Instructions:**

##### **Treasuries and GNMA Securities**

ABA# 021000018 BK of NYC/EDJ

Special Instructions:

FBO Pan American Presbyt School

Jones Account: 783-10745-1-8

#### **Physical Certificates and LP Re-registration Paperwork:**

Edward Jones

FBO: Pan American Presbyt School

Jones Account: 783-10745-1-8

Attention: Security Receivables

700 Maryville Centre Drive

St. Louis, MO 63141