

Instructions for Gifts of Stock or Mutual Funds

Thank you for supporting ATOS. Donating stock or other securities takes just three easy steps. Please keep in mind that your gift of stock or mutual funds must be received by ATOS's broker by December 31st to count as a tax deduction in the current year.

Please contact the ATOS Treasurer or Membership Secretary if you have any questions or need additional information.

1. **Direct your gift request to your broker.**
2. **Complete the following information:**

Your Name & Address:

Preferred Phone: Cell: (____) ____-_____

Work: (____) ____-_____

Home: (____) ____-_____

Name of the stock or mutual fund:

Number of shares:

Date of gift:

Estimated value of gift: \$

3. **Send the above information to ATOS:**

Donna Parker, ATOS Membership Secretary
P.O. Box 6491
Aloha, Oregon 97007-0491
(503) 372-6987
email: d.parker@atos.org

Please note that this instruction sheet should not be construed as legal or tax advice. Please contact your own accountant, attorney, or tax advisor for assistance regarding stock gifts you may be considering making to ATOS.