There are many reasons to give back to your community and help make medical care more accessible to families in need. Here are some great reasons why giving stock is a successful financial planning strategy:

- Optimize your charitable giving and realize notable tax advantages. Neither the charity nor the donor pay a capital gains tax on appreciate stock; however, the donor can deduct the full value of appreciate stock.

- Become part of a legacy by donating to a worthy non-profit

- Share your financial success with those less fortunate

We are open to any kind of stock gift including ETFs/Mutual Funds, you would like to donate! Additionally, we are actively seeking the following positions:

AMAZON
APPLE
NETFLIX
AMGEN
ACTIVISION
DISNEY
CON EDISON
MATTEL
GOOGLE
MICROSOFT
STARBUCKS
BIOGEN
S&P 500
COCA COLA
FACEBOOK
HP
BROADCOM
FIRST SOLAR
J&J
SNAP

GE
BERKSHIRE
WELLS FARGO
UPS
DELTA AIRLINES
ADOBE
AMEX
TARGET
BOEING
EXXON
DONATE THE GIFT OF STOCK

If you have questions about how you can give the gift of stock, please refer to the steps outlined in the two scenarios below:

YOU HAVE A FINANCIAL ADVISOR

**Step 1.** Ask your advisor if you have any “missing basis” stock. These are positions where you do not have a record of the cost of the stock. If you were to sell these securities, you will pay capital gains tax on the entire value. By donating these shares you avoid this high level of taxation.

**Step 2.** Ask your advisor to send you a list of your stocks held greater than one year, according to the highest percentage gainers.

**Step 3.** Determine the value of your contribution and identify the securities to be transferred.

YOU MANAGE YOUR OWN ACCOUNT

**Step 1.** Review your portfolio for missing basis stock. These are positions where you do not have a record of the cost of the stock. If you were to sell these securities, you will pay capital gains tax on the entire value. By donating these shares you avoid this high level of taxation.

**Step 2.** Sort your account according to the highest percentage gainers. Log in to your account and go to your “holdings” or “positions” page. There should be a column for the % gain-loss of each position.

**Step 3.** Determine the value of your contribution and select the securities to be transferred.

UBS Financial Services
DTC 0221
FBO Y621788/Angel Flight

TRANSFER INSTRUCTIONS

Thank you for your interest in making a charitable gift to Angel Flight West in the form of a Securities/Stock Transfer. The information below along with our Tax ID/EIN # (95-3956297), is provided to assist you in your transfer.

Please email your brokerage firm with the following transfer instructions:

ORGANIZATION INFORMATION

ANGEL FLIGHT WEST
3161 Donald Douglas Loop S
Santa Monica, CA 90405
310.390.2958

Tax ID/EIN: 95-3956297
donate@angelflightwest.org

ORGANIZATION BANK/ BROKERAGE FIRM INFO AND CONTACT

UBS Financial Services
- DTC #: 0221
- Account Name: Angel Flight
- Account Number: Y621788

Kelly Chavira
Senior Client Service Associate
The Spinner Group
310-734-3883 Direct Line
855-208-7969 Fax
http://financialservicesinc.ubs.com/team/spinner/

GIFT OF SECURITIES/STOCK

DTC instructions:
- DTC 0221
- FBO Angel Flight West
- Y6 21788

Cash:
- Bank: UBS AG
- ABA: 026007993
- Acct: UBS Financial
- A/C: 101-WA-258640-000
- FFC: Angel Flight West
- A/C: Y6 21788

UBS AG Address:
UBS AG
677 Washington Boulevard
Stamford, CT 06901
203-719-3000
NOTIFYING ANGEL FLIGHT WEST OF YOUR GIFT OF STOCK

To ensure that your gift is processed accurately, please complete the information below and email it to donate@angelflightwest.org or fax 310-397-9636. This form will notify Angel Flight West of the impending gift.

DONOR & SECURITIES INFORMATION:

Name & Type of Securities (e.g.: DELL common stock) ______________
Security Symbol________
# of Shares _________
Transfer Date ___ /___ /_____
Donor Name (Individual, Corporation, Foundation) ______________________
Donor Street Address ______________________________________________
Donor City / State / Zip ____________________ / _________ / _____________
Broker Name _____________________________________________________
Broker Company / City / State _____________________ / ____________ / ____
Donor Information: (to be used only if a question arises in the donation process)
Telephone ( ) ____ - _______ Email Address _______________________
Donor Signature_______________________
Date Signed ______________
Donor Signature_______________________
Date Signed ______________

Please consult with your tax advisor before making a charitable donation to any charity. 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 AFW as the recipient of your charitable gift.