



Stock Transfer Instructions

For the Broker:

The Southern Maine Agency on Aging accepts gifts of stock through:

Vanguard

Phone: 1 (800) 992-8327

Vanguard Tax ID Number: 23-2019846

Vanguard Account Number: 54455818

DTC Number: 0062

SMAA Tax ID Number: 01-0360259

Proceeds from stock gifts should be directed to:

Kate Putnam, Director of Development

136 U. S. Route One

Scarborough, Maine 04074

For the Donor:

Please contact: Kate Putnam, Director of Development

Phone: (207) 396-6590

E-mail: kputnam@smaaa.org

Please let her know you will be making a gift of stock and if you wish it to be restricted.

If you prefer, she can contact your broker directly.

The value of a stock gift is determined at fair market value on the day the gift is made.

1. Your broker will transfer the stock to the SMAA account if it is to be sold for SMAA, and the proceeds will be forwarded to SMAA. The stock must not be sold from the donor's account or the donor will incur capital gains
or
2. transfer the shares through Depository Trust Company (DTC) into SMAA's account at Vanguard.