The Mayflower Society

General Society of Mayflower Descendants®

Instructions for making Gifts of Securities to the General Society of Mayflower Descendants

The Tax Benefit of Making Gifts of Securities:

-First you avoid paying capital gains tax on the increased value of the stock.
-Second you can take a tax deduction for the full market value of the stock on the date of the gift.

To Make Gifts of Securities delivered through Electronic Transfer:

For donors intending to donate gifts of publicly traded securities (i.e. stocks, bonds, etc.) through electronic transfer to the General Society of Mayflower, please follow these instructions:

- Please notify the General Society of Mayflower Descendants Development Office at (508)746-3188 extension 21 or at executivedirector@theMayflowerSociety.org of your intention to donate securities, the amount and name of the security, the expected date of transfer and the delivering agent. We will notify our Broker of the upcoming securities transfer, and the pending wire transfer.
- Please instruct your broker to contact our office and we will provide the transfer information to them at that time.
- All security transfers must be made in good form.
- All marketable securities received in good form will sold on the day of receipt or the next business day, timing dependent.

To Make Gifts of Securities delivered physically:

While the GSMD would prefer to do the transfer electronically, it is also possible to do this in person. For donors intending to donate gifts of publicly traded securities (i.e. stocks, bonds, etc.) delivered physically to the General Society of Mayflower, please follow these instructions:

- Please notify The General Society of Mayflower Descendants Development Office at (508)746-3188 extension 21 or at executivedirector@theMayflowerSociety.org of your intention to donate securities, the amount and name of the security, and the expected date of delivery of the physical securities;
- For hand deliveries: Securities should be hand delivered to the General Society of Mayflower Descendants Development Office at 18 Winslow Street, Plymouth, MA during normal business hours. The actual certificate should be delivered in good form and completed with the transferor's signature or with an executed stock power attached.
- For delivery by mail: Securities should be sent via certified mail and insured for value to The General Society of Mayflower Descendants, 18 Winslow Street, Plymouth, MA 02361-3297, ATTN: Executive Director. In a separate mailing, an executed stock power should be provided.
- Securities Gifts physically received in good form will be deposited and sold in accordance with physical securities processing standards.

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