



Thank you for your interest in donating securities to the Las Lomas Education Foundation! A gift of appreciated securities may be the least expensive way to donate to our schools, and may enable you to give even more than you thought possible. You can potentially receive significant tax advantages when you donate shares of securities (stocks, bonds, shares or mutual funds, etc.) that have increased in value (please consult your tax professional).

1. You can potentially receive a tax deduction for the **full value** of your gift (not just the amount that you paid for it) at the time of your donation, provided you have owned the security at least one year.
2. You can potentially avoid paying any capital gains tax and avoid paying commissions to sell the security. Therefore, you can potentially make a larger donation to the Las Lomas Education Foundation than gifting the sales proceeds after they have been taxed.

It's Easy to Donate Securities

If you hold the securities in individual certificates: Please contact Chad Harding at (801) 835-9000 or treasurer@llef.org to receive the appropriate stock power forms and to arrange for delivery of the certificates. Complete the enclosed form letter and have your signature notarized. The date of your gift is the delivery of your completed letter of instructions, the stock certificate, and signed stock powers to the Las Lomas Education Foundation.

If the security is held in a brokerage account: You can use the enclosed form letter of instruction to have shares transferred directly into the Las Lomas Education Foundation account. Just fill in the appropriate information regarding your account and the shares you wish to fit. Check with your broker to see if they require a signature guarantee or any additional information. Please forward a copy of your letter to the Las Lomas Education Foundation (at the address on the cc: line of the form) when you submit it to your broker. This copy will enable us to track your gift. Please be aware that the date of your gift will be the date the transfer is completed, not the date of your letter. We will send you a gift acknowledgment notifying you of this date.

Thank you once again for donating to a very worthy cause – our children and their future.

Kind regards,
Chad Harding, Treasurer
Las Lomas Education Foundation
P.O. Box 7282
Menlo Park California 94026-7282



LETTER OF INSTRUCTION TO DONATE SECURITIES

Date: _____

To (Broker): _____

Address: _____

Please accept this letter as my authorization to make the following gift from my account:

Account Number: _____

Name of Security: _____

Ticker: _____

Shares to Gift: _____

DTC to: Morgan Stanley Smith Barney
DTC # 0015
FBO: Las Lomas Education Foundation
Account # 233-055956-559

Broker: Thank you for your assistance. If you have any questions regarding the transfer information, please contact Chad Harding at (801) 835-9000.

Yours sincerely,

Signature Date

Printed Name E-Mail Address

Donor: Please provide a copy of this completed letter to Las Lomas Education Foundation:

By US Mail

or by E-Mail

Las Lomas Education Foundation
Attn: Treasurer

treasurer@llef.org



LAS LOMITAS EDUCATION FOUNDATION

P.O. Box 7282
Menlo Park, CA 94026