



Guidelines for Donating Appreciated Stock or Financial Assets

Ray Graham Association (RGA) provides supports and services to nearly 2,000 children and adults with intellectual and developmental disabilities on an annual basis. RGA relies heavily on generous monetary gifts. As such, you can make gifts to RGA using appreciated stock or other financial instruments (e.g. mutual funds or bonds).

RGA is 501(c)(3) charitable organization and gifts made to our organization are subject to relevant tax deductions. We recommend consulting your financial advisor should have questions or concerns.

Once RGA receives a donation of stock, the stock is sold and funds are used to support the programs and services of the organization.

Donating stock is a very simple process!

- Complete the attached form and send it to your broker
- Send a copy to RGA's Chief Financial Officer, Carmel Cooke, at carmel@raygraham.org
- When we are notified of the transfer of funds, we will alert you and send an acknowledgement letter confirming the receipt of the gift.

If you have any questions, or if you need further information, please contact Lorri Nagle, Chief Development Officer at lorryn@raygraham.org or 630-628-7174.

Thank you for your generosity and thoughtfulness.