



Stock Gift

Stock gifts are an effective way to support the Ossabaw Island Foundation, Inc. (TOIF). By donating stock to the Ossabaw Island Foundation:

- Neither you nor TOIF (a non-profit organization) pay capital gains tax. TOIF will receive the full value of your stock.
- You will receive a charitable deduction for the full market value of your gift.

Stock Transfers

You can transfer stock to The Ossabaw Island Foundation through our brokerage firm. To begin the process notify Elizabeth DuBose and Deborah Spears.

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|---------------------------|---|
| DTC#: | 0226 |
| Brokerage Firm: | Truist Investment Services LLC |
| Credit Account: | Ossabaw Island Foundation, Inc. |
| Credit Account #: | G5R-064718 |
| Contact Person: | Deborah Spears |
| Contact Number: | 843-301-3531 |
| Contact Email: | Deborah.Spears@truist.com |
| TOIF Notification: | elizabeth@ossabawisland.org or 912-344-3900 for a gift acknowledgement |

If you have additional questions about stock gifts, please reach out to Elizabeth Dubose, Executive Director of the Ossabaw Island Foundation at the email address and telephone number listed above.

**The material contained herein is not offered as legal or tax advice. Examples of prospective benefits are based on assumptions that may not apply to your situation at the time of your gift. We encourage our donors to seek the advice of a tax advisor, attorney, and/or financial planner to confirm that a contemplated gift is appropriate to your overall circumstances and planning.*

August 11, 2023