

GIFTS OF SECURITIES

A gift of appreciated securities makes sense any time. In making a gift of appreciated securities such as stocks, bonds or mutual fund shares, you can make a meaningful contribution to Wheeler Clinic and derive practical financial advantages at the same time. If you have experienced growth in your investments you are in an excellent position to donate appreciated securities to support the clinic's program and services. Please contact us for details on transferring securities.

1. Electronic Transfers

This is the easiest and most common means of gifting stock. The development office can provide you with Wheeler Clinic account information over the phone.

2. Transferring Stock Certificates

If you are holding actual stock certificates, simply call the Development Office for the paperwork needed to ensure a safe and easy transaction by mail.

Please contact:

Wendy DeAngelo, Chief Business Development Officer

860.224.6388

E-mail: wdeangelo@wheelerclinic.org

The information provided is general and not intended to be legal or tax advice. Consult with your attorney or professional advisor for advice or assistance in specific cases.