



GIFTS OF STOCK OR SECURITIES

Making a gift of securities (stocks, bonds, and mutual funds) to Walker can offer significant tax advantages for many donors. In most cases, you are eligible for an income tax deduction based on the full market value of the stock on the day that Walker receives it. Please consult with your broker or tax advisor for more information.

To make a gift of securities, please contact the Walker Advancement office to notify us of your intent. We can provide additional information and will work with your stock broker to assist with the transfer.

Carolyn M. Wood, Vice President of Advancement
Walker
1968 Central Avenue
Needham, MA 02492
781-292-2144
cwood@walkercares.org

To expedite the stock transfer, please instruct your broker to contact:
Matthew R. Williams
RBC Wealth Management
9 Trafalgar Square STE 200
Nashua, NH 03063
Phone: (603) 577-4908
Fax: (603) 577-4959

Please include: donor's name, name of stock and number of shares given, date and approximate value of gift, and the fund to which the money is designated (e.g., annual fund, capital campaign). Walker will then issue instructions to our broker regarding the disposition of shares and send you the information you need to receive proper tax credit.

Walker Account Number: 30097793
DTC Number: 0235
Walker Tax ID Number: 042-171-186