

## GIVING SECURITIES

*By making gifts of appreciated securities (as opposed to selling the securities first and then donating the proceeds), it is possible to avoid paying capital gains tax, and you can take the full market value as a charitable deduction.*

An easy way to give securities is by DIRECT TRANSFER – your broker electronically delivers your securities through DTC to Infinex Group dba Bar Harbor Financial Services, which is authorized to accept gifts for the Southwest Harbor Public Library Endowment Campaign:

1. **Prior to transfer**, Please call Southwest Harbor Public Library's Director Candy Emlen at 207-244-7065 to confirm the gift.

**This alert is critical! It is the only way Southwest Harbor Public Library will know who the donor is.**

2. Your broker makes the DTC stock transfer to:  
Pershing LLC (Bar Harbor Financial Services' clearing firm), DTC # 0443  
Further credit to: Account #ABM018664 (Southwest Harbor Public Library)

Bar Harbor Financial Services  
135 High Street  
Ellsworth, ME 04605  
Phone: 800-479-9963  
Fax: 207-667-4925

3. Your broker must then notify Ron Hamilton or Sonya Mitchell at Bar Harbor Financial Services about the assets that will be transferred – e.g.: “I am sending [number] of shares of [kind of stock] and I want it to go to the Southwest Harbor Public Library's Annual Appeal or Endowment Fund. The donor is [name] [mailing address].”

*Government Securities and Mutual Funds are also eligible. Please contact Ron Hamilton at 1-800-479-9963 to discuss proper transfer methods.*

Candy Emlen, Director  
Southwest Harbor Public Library, P.O. Box 157, Southwest Harbor, Maine 04679  
207-244-7065 voice and fax

The Southwest Harbor Public Library is a 507©(3) Charitable Organization  
Federal Identification Number: 01-0241528