



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 Erich Reed 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.

Erich Reed, Director
Southwest Harbor Public Library, P.O. Box 157, Southwest Harbor, Maine 04679
207-244-7065 voice
207-244-3616 fax

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