FREMONT UNION HIGH SCHOOLS FOUNDATION

Stock Donation Guide

For individual donors, tax advisors, wealth managers and trust fund managers.

Cupertino • Fremont • Homestead • Lynbrook • Monta Vista High Schools

For 40+ years, the all-volunteer FUHS Foundation has supported educational opportunity across the district. Your gift helps serve approximately 9,000 students in our community.

Why consider a stock gift?

More value for students

A direct gift of appreciated shares may avoid capital gains tax on donated appreciation.

Potential tax deduction

Potential charitable deduction; valuation and limits depend on donor type and holding period.

Preserve cash

Support local education with investments while keeping cash available for other needs.

1 Initiate the gift through the donor's brokerage

The donor or authorized representative should request an **in-kind charitable transfer** from the donor's brokerage, specifying the stock and share count. For a direct stock gift, transfer shares rather than selling them first.

2 Provide the Foundation's receiving account

RECEIVING FIRM

Morgan Stanley Smith Barney LLC

DTC NUMBER **0015**

ACCOUNT NUMBER **090022772245**

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3 Important: complete the donation form after transfer

Please submit the form for the treasurer's bookkeeping and to request a formal gift acknowledgment for tax records. The acknowledgment follows verification of receipt.

COMPLETE THE DONATION FORM →

Click the button to open Google Forms.

All questions: treasurer@fuhsfoundation.org

fuhsfoundation.org | 501(c)(3) nonprofit | **EIN:** 94-2907804

The Foundation does not provide tax or financial advice. Consult your tax professional and financial advisor before donating. Tax treatment depends on donor type, holding period and current law. Eligibility, valuation, deduction limits and reporting rules apply. No deduction or tax savings is guaranteed.

Resources: IRS charitable contributions • Stock giving benefits | October 2026