



## **GIFTS OF STOCK OR SECURITIES**

Making a gift of securities (stocks, bonds, and mutual funds) to Walker can offer 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.

Amy Perna, Vice President of Advancement  
Walker  
1968 Central Avenue  
Needham, MA 02492  
781-292-2110  
[aperna@walkercares.org](mailto:aperna@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: 04-2171186**