



Incoming Transfer of Stock Donations Instructions

Gifts of securities are a smart and simple way to maximize your charitable giving. You may find that you can make a larger contribution to Lowell Observatory by giving stock than you can by giving cash.

A gift of securities offers you a number of advantages. Your gift is the full market value of the securities, and you may deduct this amount from your taxable income (if you itemize) for federal income tax purposes if the stock has been held for at least one year. Moreover, you do not have to pay capital gains tax on the increased value of the securities, as you would if you sold them and donated the cash.

Below is information for your broker to transfer stock directly to Lowell Observatory.

For further information, or to let us know when you have made a stock transfer, please contact Rachel Edelstein redelstein@lowell.edu or (928) 255-0229.

Stock Donations (into BNY Mellon):

DTC DELIVERY INSTRUCTIONS:

DTC # 8275/ BNY Mellon Wealth Management
Reference: 10009627020/LOWELL OBSERVATORY-IMA-DONOR FND-SUB

BNY Mellon Wealth Management
201 Washington Street, 10th Floor
Boston, MA 02108