



Northeast Harbor Library
 PO Box 279
 1 Joy Road
 Northeast Harbor, Maine 04662

Giving Securities

When you make 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 Bar Harbor Wealth Management, which is authorized to accept gifts for the Northeast Harbor Library.

1. Prior to transfer, please call the Northeast Harbor Library Development Coordinator at 207-276-3333 to confirm the gift. This alert is critical to let Library know the donor’s name and contact information.

Even if the donor wishes to remain anonymous, please provide the donor’s name and address so we may send a letter confirming nonprofit status for the IRS. It is also helpful to us if you provide a phone number in case we have a question about the gift.

2. Your broker makes the DTC stock transfer to:

ACAT Eligibility	ACAT Participant # 2663
DTC Clearing Number	SEI Private Trust Company DTCC Participant #: 2663 Account #: 52006134006 Account Name: Northeast Harbor Library

Bar Harbor Wealth Management
 135 High Street
 Ellsworth, ME 04605
 Phone: 207-667-6404
 Fax: 207-667-6641

3. Your broker then notifies Katy Bryer (207-667-6404) at Bar Harbor Wealth Management about the assets that will be transferred:

“I am sending [number] of shares of [kind of stock] to go to the Northeast Harbor Library Operating Endowment Fund. The donor is [name] [mailing address].”

Government Securities and Mutual Funds are also eligible. Please contact Katy Bryer at 207-667-6404 to discuss proper transfer methods.

The Northeast Harbor Library is a 501(c)(3) Charitable Organization
 Federal Identification Number: 01-0220091