



## The Campaign for Endowment

# Giving Securities

*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, your broker must notify Ron Hamilton 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 Endowment Campaign. The donor is [name] [mailing address].”

**This alert is critical! It is the only way Bar Harbor Financial Services will know that the gift is intended for the library’s endowment and who the donor is.**

Please contact Ron Hamilton at 1-800-479-9963 or rhamilton@infinexgroup.com.

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. Please call Southwest Harbor Public Library’s Director Candy Emlen at 207-244-7065 to confirm the gift.

*Government Securities and Mutual Funds are also eligible.*

*Please contact Ron Hamilton at 1-800-479-9963 to discuss proper transfer methods.*

David Kessner and Patsy Fogarty - Endowment Committee Chairs  
David Kessner: dkswh@dmkessner.com ... Patsy Fogarty: patsyfog3@gmail.com  
Southwest Harbor Public Library

Post Office Box 157, Southwest Harbor, Maine 04679-0157  
207-244-7065 www.swharbor.lib.me.us

*The Southwest Harbor Public Library is a 501(c)(3) Charitable Organization.*