



**Billings Community Foundation (BCF)
Stock Transfer to Merrill Lynch**

Many gifts of appreciated securities such as stocks, bonds and mutual funds provide a charitable deduction for the full fair market value of the donated asset and, if you have owned them longer than one year, you may pay no capital gains tax on the transaction.

If your gift is intended to qualify for the Montana Endowment Tax Credit, please contact BCF Executive Director, Lauren Wright at 406-839-3334 or email lwright@billingscommunityfoundation.org.

Start the Planned Giving process [HERE](#).

Information for your financial advisor:

Merrill Lynch, Billings Office
PATRICK V. HOUGHTON, CRPC
MERRILL LYNCH GLOBAL WEALTH MANAGEMENT
Wealth Management Advisor
(406) 255-5521
patrick_houghton@ml.com

Securities - Investment Name: _____
Cost Basis (if known): \$ _____

NMLS ID# _____
Account # corresponding to your charity of choice.
Billings Community Foundation Main Account # _____

If a non-profit endowment account already exists with the Billings Community Foundation at **MERRILL LYNCH** Wealth Management, we can provide that account number. If the account does not exist yet, please designate funds to the Billings Community Foundation Main Account and we will move it to the newly created account from there.

Please notify the Billings Community Foundation if you choose to donate a gift of stock, as electronic stock transfers usually come to us without any donor identification.

****Do not instruct your broker to sell on the behalf of the Billings Community Foundation.**