



, The Epsilon Educational Endowment | 2746 Beechwood Dr SE, Grand Rapids, MI 49506
Steve Starnes, E'01 , Epsilon Educational Endowment #4 | ✉ steve@grandwealth.com 📞 616-802-4462

Gifts of Stock

One of the biggest tax advantages in charitable giving continues to be the double benefit donors get when donating appreciated assets to The Epsilon Educational Endowment instead of cash. By giving appreciated assets (like stocks held for more than one year), you'll get a charitable tax deduction for the full value of the asset and avoid any capital gains tax that would have applied if you had sold the stock and made your gift in cash.

Please provide the following information in your request when directing your broker to transfer your shares to Alpha Epsilon:

The Epsilon Educational Endowment
2746 Beechwood Dr SE
Grand Rapids, MI 49506
EIN: 23-7010656

Alpha Epsilon's DTC Number: 0226
Alpha Epsilon's Account Name: Epsilon Educational Endowment
Alpha Epsilon's FBO Account Number: Z40-054304

It is important to notify The Epsilon Educational Endowment of the specifics of this transaction (stock name, share quantity, gift designation) so we can credit your gift appropriately. Please contact Steve Starnes, E'01 by phone at 616-802-4462 or email steve@grandwealth.com (<mailto:steve@grandwealth.com>).

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