

A Gift Worth Giving Funding the SARAH Endowment



Stocks or Bonds (Sample Language)

Stocks or Bonds: If you are considering a gift to SARAH in the form of stocks, bonds or other investments, there may be significant tax advantages of which you should be aware. Please be sure to consult your personal tax advisor regarding the nature and timing of such a gift.

If a donor wishes to designate the general Endowment Fund as the owner of securities, the following ownership designation should be used:

- *SARAH Endowment Fund, currently located in Guilford, Connecticut*

If a donor wishes to direct a gift of securities to a specific Agency's Restricted Fund (managed through the Endowment), one of the following ownership designations should be used:

- *SARAH SENECA Restricted Fund held by the SARAH Endowment Fund, currently located in Guilford, Connecticut*
- *SARAH Tuxis Restricted Fund held by the SARAH Endowment Fund, currently located in Guilford, Connecticut*
- *SARAH, Inc. Restricted Fund held by the SARAH Endowment Fund, currently located in Guilford, Connecticut*