



Stock, Bonds, and Mutual Fund Donations

Overview

Mountain Home accepts financial assets (stocks, bonds, trusts, life insurance, annuities, etc.) and appreciated real estate. We understand these are especially beneficial for our supporters, as the donor may enjoy certain tax advantages, particularly when given directly to MHM. The charitable deduction value of a gift of appreciated assets is the asset's value at the time of transfer to MHM.

We always recommend you consult your tax or financial professional before making charitable donations. MHM utilizes the Montana Community Foundation and uses the net asset value established after the markets close on the transfer day.

Process

To initiate a stock transfer, please work with your broker to complete a transfer form:

DTC code	0361
Account number	57837907
Account name	Mountain Home Montana Inc, Hamilton Endowment Fund
Mountain Home EIN	81-0520628
Receiving Institution	DA Davidson

If you have questions, Mountain Home's DA Davidson contact is Ivy Burford, iburford@dadco.com, 800-704-9949.