

THANK YOU—your contribution is deeply appreciated!

• **Gifts of Appreciated Stocks, Bonds, and Mutual Funds:** North Yarmouth Historical Society gratefully accepts gifts of publicly-traded stocks, bonds, and mutual funds. It is the general policy of NYHS to sell gifted securities upon receipt. Charitable gifts of securities that have been held for at least one year and have appreciated in value may offer special tax advantages. Please consult with your tax advisor.

Bigelow Investment Advisors LLC, under the direction of Kathryn Dion, oversees the transfer of such gifts to NYHS's Capital Campaign account at Norway Savings Bank.

Most stocks and mutual funds are DTC eligible. For all DTC-eligible securities, deliveries must include the client name and NYHS's Schwab One account number: #2739-6787. Delivery to DTC Clearing 0164, Code 40.

• **IRA Qualified Charitable Distribution:** Individuals over the age of 70 1/2 may make tax free distributions, not to exceed \$100,000 in a calendar year, from an IRA to NYHS or another public charity. Special conditions and requirements apply so please consult your tax professional.

Our fundraising team is happy to discuss any of the above options with you. Please contact us at nyhs1680@gmail.com so we can touch base.

North Yarmouth Historical Society is a non profit organization and your gift is tax deductible. THANK YOU for your generosity!