

FORTERRA

FOR THE PEOPLE. FOR THE LAND. FOREVER.

Gifts of Appreciated Stock to Forterra

You can make a gift of appreciated securities – publicly traded stocks, bonds, and mutual fund shares – to Forterra while avoiding capital gains tax, diversifying your portfolio, and/or securing a stream of income.

Benefits

- Receive credit and an immediate income tax deduction for the fair market value (average high and low prices on the day of the transfer).
- Avoid capital gains tax.

Please note that the securities you use to make your gift must have been held by you for more than one year to be fully deductible.

Be sure to consult with your financial advisor, and please note that there are different procedures for stocks and mutual funds.

How to make stock donations

Donating stock is easy to do – simply email Forterra and your broker in the same message. Provide Forterra and your broker with your name, address, phone, and email and include your broker's name, the name of the stock, its ticker symbol, and the number of shares you wish to donate. Your broker should follow up with a voice or in person confirmation with you before proceeding.

Grantee: Forterra

Grantee's broker: Wedbush Morgan Securities

DTC Number: 0103

Account number: 7971-7902 AED6

Contact name: Bob Ward

Contact phone number: 206-623-6678

Forterra's Tax ID Number: 94-3112461

Please alert us of your plans to make a stock transfer so we can track and acknowledge your gift properly. After Forterra contacts your broker to complete the transaction, we will send you a receipt.

Questions? Contact Rachel Perlot at rperlot@forterra.org or 206-905-6921.