

## Public Libraries Briefcase

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No. 16, March 2007

A publication of the BRASS Business Reference in Public Libraries Committee

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# Historic Stock Prices

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Business librarians are occasionally asked to find historic stock quotes with the dates ranging from just a few years ago, to several decades in the past. The information is needed to compute tax returns. When someone inherits a stock they usually need to know the price of the stock on the day that they inherit it. This is called a “step-up in basis” and minimizes the beneficiary’s capital gains tax. If a person is computing estate taxes, he will need to know the price of the stock on the day the deceased bought the stock.

1. First you need to find the stock symbol. This is probably the most important step – making sure that you have the correct company. You can find this information at <http://finance.yahoo.com>. Click on symbol lookup and put in the name of the company. Check with the patron to be sure that you have tADRs (American Depositary Receipts). You can get the price on the ADR, but not the price traded on the foreign exchange.
3. Once you establish the ticker symbol in Yahoo! Finance, click on that symbol to get to the quote page.
4. Now you can click on historic quotes on the left side of the page and put in your date. Select daily prices. I usually put in about a seven day date range. Print that page up for the patron. You can also use <http://www.bigcharts.com> if you prefer. I like Yahoo! better because you can print up a date range and because other information about the company is linked to the site.
5. A company will not be in Yahoo! Finance, Big Charts or any other online database if it has changed names. Enron. If you can’t find a company in the databases, there is a strong probability that there has been some kind of corporate change that has caused the company prices to be purged from the database. In this event, you will have to look up the stock quotes in the newspapers. When you look up stock quotes in newspapers you don’t use ticker symbols; the companies are listed in newspapers alphabetically by the name of the company.
6. If the company has changed names and you know the name of the new company, you can try going to the company website. If you cannot easily locate the company’s website, go to <http://finance.yahoo.com>. Using the ticker symbol of your company, go to that company’s page in

