**Stocks Web Copy**

**GIVE STOCKS AND SECURITIES**

Support the work of The Center by donating stocks and securities. We accept donations of commonly held, publicly traded stocks. The easiest way for you to gift stock or securities to The Center is through an electronic transfer (DTC) from your brokerage account to The Center’s account.

**Donating Stock Or Securities Can Be Made In As Little As Two Easy Steps:**

1. Complete the attached **Stock Gift Notification** form and return to us via email or US postal service.

2. Complete the **Electronic Transfer Authorization** form and provide it to your broker. This will provide your broker with all the information they need to complete a transfer on your behalf.

To make a transfer of stocks, bonds or mutual funds, please work with your broker or if you have questions, contact Advancement Director, Melanie Benjamin at 434.974.7756 or Melanie@thecentercville.org

**INFORMATION FOR BROKERS FACILITATING TRANSFERS**

* Ameritrade manages the Center’s securities transfers. Their phone number is: 1-800-454-9272.
* The account name is Senior Center, Inc.
* The DTC number for electronic transfers is 0188.
* Our account number is 426995119.
* Please include the donor name in the “Text Comment” section of the DTC Screen in order to identify the donor associated with the stock donation. This ensures that the gift can be properly acknowledged. If the donor prefers to remain anonymous, please include the donor’s name and note the preference to remain anonymous.
* For printer-friendly instructions, **click here**.

**GIFT VALUATION**

Your generous charitable gift to The Center will be valued at the median market price on the date of the gift, which is determined by the day the securities are received in our account.

**Stock Transfer Instructions**

Thank you for your interest in making a charitable gift to The Center. The easiest way for you to gift stock or securities to The Center is through an electronic transfer (DTC) from your brokerage account to The Center’s account. Donating stock or securities can be completed in as little as two easy steps.

**TWO EASY STEPS GIVE STOCKS OR SECURITIES TO THE CENTER:**

1. Complete the attached **Stock Gift Notification** form and return to us via, email or US postal service.

2. Complete the **Electronic Transfer Authorization** form and provide it to your broker. This will provide your broker with all the information they need to complete a transfer on your behalf.

**To Donate Stock to The Center, Please Note the Following:**

**Brokerage House:** Ameritrade

**Account Name:** Senior Center, Inc.

**Account Number:** 426995119

**DTC Number:** 0188

**Reference:** Donor Name

**Ameritrade phone number:** 1-800-454-9272

**Text Comment:** Donor’s Name. (If donor prefers to remain anonymous, please include their name and note their preference to remain anonymous.

**OF NOTE:**

Please remind your broker(age) to include all the information including your name, contact information and special instructions for the transfer. This information is essential for timely acknowledgement. When stocks are transferred electronically, we are informed only of the stock name and the number of shares, not the name of the donor, unless you authorize your broker to share this information with us. Failure to share your gift intent with us may delay the gift acknowledgement for tax reporting purposes.

Please seek the counsel of your tax advisor, attorney and/or financial planner to review tax calculations to ensure that a contemplated gift is appropriate for your situation. The material presented here is not offered as legal or tax advice.

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STOCK GIFT NOTIFICATION

Thank you for your interest in making a charitable gift to The Center. The Center accepts donations of commonly held, publicly traded stocks. Please complete the information below to notify The Center of your gift and help ensure it is processed accurately. If you have questions, please contact Melanie Benjamin, Advancement Director at 434-974-7756, or melanie@thecentercville.org. Once completed you may email this form to Melanie’s attention or mail this completed form to:

**The Center**

**491 Hillsdale Drive**

**Charlottesville, VA 22901**

**Attn: Melanie Benjamin**

**DONOR & SECURITIES INFORMATION:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_ /\_\_\_/\_\_\_

Name & Type of Securities Security Symbol # of Shares Transfer Date

**BROKERAGE INFORMATION:**

Broker’s Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Brokerage Firm Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**DONOR INFORMATION:** By providing Donor Information, you are enabling The Center to provide you with a timely acknowledgement of your gift for tax purposes.

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State\_\_\_\_\_\_\_ Zip\_\_\_\_\_\_\_\_\_\_

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor wishes to remain anonymous?  Yes *- By checking this box, you will receive an acknowledgement of your gift, but your donation will be reported as an anonymous gift.*

Please seek the counsel of your tax advisor, attorney and/or financial planner to review tax calculations to ensure that a contemplated gift is appropriate for your situation.

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ELECTRONIC TRANSFER AUTHORIZATION

Please transfer the listed securities from my account to The Center’s account with Ameritrade using the following information:

**Brokerage House:** Ameritrade **–** phone number 1-800-454-9272

**Account Name:** Senior Center, Inc.

**Account Number:** 426995119

**DTC Number:** 0188

**Reference:** Donor Name - *Including the donor name in the “Text Comment” of DTC Screen will*

*help to link the donor with the stock donation. and will ensure the gift is properly acknowledged. Should donor wish to remain anonymous, please include their name and note (anonymous).*

**BROKERAGE INFORMATION:**

Broker’s Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Brokerage Firm Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PERSONAL INFORMATION:**

Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State\_\_\_\_\_\_\_ Zip\_\_\_\_\_\_\_\_\_\_

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 I hereby release my name and contact information so that I may receive a receipt from The Center. *If you choose not to release this information, The Center may not be able to provide you with a receipt of your gift.*

**SECURITIES INFORMATION:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_ /\_\_\_/\_\_\_

Name & Type of Securities Security Symbol # of Shares Transfer Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_/\_\_\_/\_\_\_

Donor Signature Date Signed

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_/\_\_\_/\_\_\_

Donor Signature Date Signed

NOTE *- All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures).*