



Donation of Appreciated Stock

Giving appreciated securities, including stocks or bonds, is an easy way for you to make a charitable donation with considerable potential benefits:

- Avoid paying capital gains tax
- Receive a charitable income tax-deduction for the full fair market value of the securities
- Increase your capacity to be philanthropic!

What are the benefits of giving securities?

Donating securities that have increase in value is a tax-savvy plan and helps support our community. Gifts of appreciated securities that you have held for longer than 12 months offer a two-fold tax savings:

- If you itemize your deductions, you may receive a charitable income tax deduction for the full fair market value of the securities on the date of the gift.
- You do not pay capital gains tax on the increase in the value of the securities. For example, if you were granted the securities that now have a fair market value of \$100,000, you do not pay tax on the \$100,000 gain.

How does it work?

- Complete the attached form: "Notification for Donation of Appreciated Stock." Submit the form to your broker with instructions to electronically transfer the securities to the Weinstein Jewish Community Center (WJCC).
- The gift is considered completed on the date the securities are transferred and received into the account of the WJCC.
- You may receive an income tax-deduction for the full fair market value of the securities on the date the gift of securities is complete.
- The fair market value, for tax purposes, is the average of the high and low trading prices of the securities on the date the transaction is complete.
- Gift securities may be deductible up to 30% of your adjusted income. Excess deductible amounts may be carried forward for five years.

For more information and to make your contribution, please contact Susan Herzick at sherzick@weinsteinjcc.org or 804.545.8609.

Thank you for your support!



Notification for Donation of Appreciated Stock

Thank you for your inquiry about a transfer of securities to Weinstein JCC. Please complete the below information and submit to your broker.

I/We _____ (full names on certificate) wish to make a charitable gift to the Weinstein Jewish Community Center. Please transfer the following securities from my/our account on _____(date).

Number of Shares: _____ **Security Name:** _____

Ticker Symbol: _____ **Anticipated Amount of Gift: \$** _____

This gift is ___unrestricted or ___restricted for the following use: _____

Account holder 1 Signature _____

Account holder 2 Signature _____

Address: _____ City: _____ State _____ Zip: _____

Phone: _____ Email: _____

As my broker, you are hereby requested to transmit the above indicated shares electronically to the following Brokerage Account and to notify the organization according to the contact information below:

Weinstein JCC Brokerage Firm

Wells Fargo Advisors
1800 Bayberry Court, Ste 100
Richmond, VA 23226
Attn: Michael Barck
Direct: 804-289-2232
michael.barck@wfadvisors.com

Acct: Jewish Community Center of Richmond
DTC: 0141
Account Number: 2717-8701
WJCC Tax-ID#: 54-0535104

Weinstein JCC Contact

Please fax or email a copy of this form to: Susan Herzick, Weinstein JCC Development Director at sherzick@weinsteinjcc.org or fax (804) 285-3139 or phone (804) 545-8609.