



## 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 Stephanie Sulmer at [ssulmer@weinsteinjcc.org](mailto:ssulmer@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: Stephanie Sulmer, Weinstein JCC Development Director at [ssulmer@weinsteinjcc.org](mailto:ssulmer@weinsteinjcc.org), fax (804) 285-3139, or phone (804) 545-8609.