



GIFTS OF STOCK

Gifts to the Heart of Virginia Council of appreciated securities that have been held for more than one year have significant advantages over gifts, including:

- Avoidance of all capital gains taxes on the appreciated portion of the stock
- A tax deduction equal to the full fair market value of the stock, regardless of its original cost basis (but only to the extent of 30% of adjusted gross income, although the excess may be carried over for five years)
- The ability to make a larger gift than might be possible using available cash.

To Donate Securities:

Send or deliver the certificate(s) and a signed stock power in separate envelopes – for security purposes, do not mail them together.

Broker-Held Securities:

Your gift of stock can be transferred directly to the Heart of Virginia Council’s brokers by your broker. Our brokers include:

Davenport & Company	Scott & Stringfellow	RBC Wealth Management	Wachovia Securities
One James Center	P.O. Box 1575	919 E Main St	Acct. 1708-04007
Richmond, VA 23285	Richmond, VA 23218	Richmond, VA 23219	Tel: (804) 649-2311
Tel: (804) 780-2000	Tel: (804) 643-1811	Tel: (804) 225-1400	Clifford Singer
Acct: 1683-0634	Acct: 1692-1010	Acct: 30561062	
DTC: 715	DTC: 0702	DTC: 0235	
Lee Keiger	Allen H. Goode IV	Brian Ford	

AG Edwards & Sons
P.O. Box 426
Richmond, VA 23218-0426
Tel. (800) 343-2898
Acct: 647-6647003310
Dudley #225-101

In addition, your broker should notify the council service center, at 804-355-4306, to inform the council of your gift.

The Heart of Virginia Council is a 501(c)(3) corporation under the Internal Revenue Code. This information is provided as a service to our donors and is not specific legal advice. The council recommends that you consult your own advisors for specific legal advice.

