



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 One James Center Richmond, VA 23285 Tel: (804) 780-2000 Acct: 1683-0634 DTC: 715 Lee Keiger	Scott & Stringfellow P.O. Box 1575 Richmond, VA 23218 Tel: (804) 643-1811 Acct: 1692-1010 DTC: 0702 Allen H. Goode IV	RBC Wealth Management 919 E Main St Richmond, VA 23219 Tel: (804) 225-1400 Acct: 30561062 DTC: 0235 Brian Ford	AG Edwards & Sons P.O. Box 426 Richmond, VA 23218 Tel. (800) 343-2898 Acct: 647-6647003310 Dudley #225-101
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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.

