



THE AMERICAN
CIVIL WAR CENTER
At Historic Tredegar

Appreciated Stock as a Charitable Gift

One of the most satisfactory ways for a donor to give a gift to the Center, a 501(C)3 charitable organization, is to use appreciated stock.

Giving stocks, bonds, and mutual fund shares that have increased in value (and which the donor has owned for more than one year) provides greater tax benefits to the donor than giving cash. Not only can the donor deduct the full market value of the securities but also avoid paying capital gains tax on the appreciation.

Instructions for Giving Stock to the Center

- Please inform the director of development, Celia Luxmoore, that a stock gift is being transferred. The donor's name does not always appear on the stock transfer information, so please ask your broker to add your name in the subject line of the transfer so that we can identify you and thank you. Phone 804.780.1865 or email cluxmoore@tredegar.org. If full details are available already, please complete the linked [Stock Donation](#) form.
- The donor's broker should transfer the stock into the Center's account. The stock will then be sold immediately.

Account No. 83579579

Delivery Trust Company (DTC) No. 0715

The Center's Federal Identification Number (FID) is 54-1999350

Name of our broker: Davenport & Co. LLC
901 East Cary Street
Richmond VA 23219
Phone: 804.780.2023
Fax: 804.780.2198

Attention: Carol Parkinson

Considerations

- **If a transfer to the Center's brokerage account is not possible**, the donor's broker should become an agent for the Center and set up an account for the Center and sell the stock immediately.

- **If a transfer using stock certificates is unavoidable**, the donor should send unendorsed certificates by regular first class mail, along with a letter of transmittal signed by the owner to the director of development. Under separate cover, the donor should mail a signed stock power executed in blank for each security along with a copy of the letter of transmittal. The donor should **not** fill out the Center's name as transferee on either the stock certificates or stock power.
- **Securities that have decreased in value** should first be sold by the donor and the cash proceeds given to the Center. The donor then can deduct the capital loss to offset any capital gain.

Gift Value

The gift value for Internal Revenue Service declaration will be the median of the high and low selling price of the stock or bond on the date of the gift. An increase in value after the date of the gift will accrue to the Center: a loss will be absorbed by the Center as a cost of doing business.