



The Greater Lynchburg Community Trust

101 Paulette Circle, Suite B, Lynchburg, VA 24502 · (434) 845-6500 · Fax (434) 845-6530
www.lynchburgtrust.org

Gifts of Stock or Appreciated Securities

Giving shares of appreciated stock bonds, mutual funds, and other securities is an especially tax-wise way to make a gift of The Greater Lynchburg Community Trust. If you have held securities for more than one year that have increased in value since acquisition, you will receive a charitable tax deduction equal to the current value. This allows you to avoid paying capital gains tax you would owe on the gain in value if you sold the securities. Gifts of securities are deductible for federal tax purposes up to a limit of 30% of your adjusted gross income.

How to Make a Gift of Stock

1. By contacting The Greater Lynchburg Community Trust **first**, we will ensure that your gift is handled to your specification and you receive proper credit and acknowledgement for it.

Please notify The Greater Lynchburg Community Trust of your stock transfer by any of the following options:

- FAX – a fax copy of your instructions to your broker (letter example follows) to The Greater Lynchburg Community Trust at 434-845-6530.
 - MAIL – a copy of the instructions to your broker (letter example follows) by mail to:
The Greater Lynchburg Community Trust
101 Paulette Circle, Suite B
Lynchburg, VA 24502
 - EMAIL – a copy of the instructions to your broker (letter example follows) addressed to Cheryl Hall at challglct@verizon.net.
 - TELEPHONE – call The Greater Lynchburg Community Trust office at 434-845-6500 to advise us of your intentions.
2. Notify your broker or commercial banker that you are giving securities to The Greater Lynchburg Community Trust.

3. The stock should be transferred into The Greater Lynchburg Community Trust's account:

**The Greater Lynchburg Community Trust's Tax ID #:
54-6112680**

BB&T (Ph. #276-666-3290):

DTC Participant #: 5385 Account #: 1832002236

Bank of America (Ph. #866-461-7287):

DTC Participant #: 0955 Account #: 000180019810

Davenport & Company, LLC (Ph. #434-948-1100):

DTC Participant #: 0715 Account #: 54351391

Scott & Stringfellow, Inc. (Ph. #434-846-2711):

DTC Participant #: 0702 Account #: 38385407

Smith Barney (Ph. #434-385-9600):

DTC Participant #: 0418 Account #: 41J-00506-17-42N

SunTrust (Ph. #434-847-2268):

DTC Participant #: 2971 Account #: 7022309

Wells Fargo (Ph. #540-563-7744):

DTC Participant #: 0929 Account #: 5019004617

Wells Fargo Advisors (Ph. #434-832-8425):

DTC Participant #: 0141 Account #: 18702237 (Gayle)

Account #: 37180384 (Smith)

Account #: 54910230 (Wiley)

Account #: 37180382 (Faith Christian)

Account #: 36040688 (Boatner)

Sample stock transfer authorization letter

Date: _____

Name of Broker/Bank: _____

Address: _____

To Whom It May Concern:

This letter will serve as official authorization to transfer _____ shares of _____ stock from my account number _____ to _____ (Broker's name and address), account number _____ for credit to The Greater Lynchburg Community Trust. For any additional information, you may call Cheryl Hall at 434-845-6500. I would appreciate a confirmation from you of the mean value of the stock gift on _____ (date stock was transferred), which you may send to my attention at _____ (your address) or fax to _____ (your fax number). Please send a copy of the confirmation letter to The Greater Lynchburg Community Trust, 101 Paulette Circle, Suite B, Lynchburg, VA 24502.

Sincerely,

c: The Greater Lynchburg Community Trust
101 Paulette Circle, Suite B
Lynchburg, VA 24502

For additional information about giving securities, please call The Greater Lynchburg Community Trust office at 434-845-6500.