CHARTER OAK
CULTURAL CENTER
Art that moves the world

Transfer Instructions for Gifts of Appreciated Stocks or Securities

Thank you for considering a gift of publicly traded securities to Charter Oak Cultural Center! By donating your appreciated stock, you avoid paying capital gains tax in addition to receiving a tax deduction and our organization gets the full value of your generosity.

Charter Oak Cultural Center is a 501c3 tax-exempt nonprofit organization.
Our federal tax identification number is 06-1026597.

Our mailing address is:
Charter Oak Cultural Center
21 Charter Oak Avenue
Hartford, CT 06106

Phone: 860-310-2583
Email: lauriel@charteroakcenter.org

Electronic delivery of shares of stock is the most secure and efficient delivery process available.

Step 1: Notification of Donor Intent

Please notify us of your intent to make a gift of securities. Under SEC regulations, your broker may not tell us your name when making the transfer of stock from your account to **Charter Oak Cultural Center**. So that we may acknowledge your donation and provide documentation for your tax records, please advise **Charter Oak Cultural Center** of your generous contribution by providing:

- Your name and complete preferred address.
- Name of stock or securities.
- Number of shares or securities transferred.
- Date of transfer request.

If you would like your gift to be anonymous, simply let us know when notifying us of your gift, and your name will not appear in public recognition lists.

Step 2: Authorize your broker or financial agent to transfer shares to our brokerage account.

For securities delivered electronically, the following will help your broker facilitate an electronic transfer:

Charter Oak Cultural Center Stockbroker: TD Ameritrade
DTC Number: 0188
Account Name: **Charter Oak Cultural Center** Tax ID# 06-1026597. Account Number: 491473366
Phone Number: 800-276-8746

If you have physical stock certificates, please contact us directly to make arrangements.

Questions? Please contact Laurie Leadeer at lauriel@charteroakcenter.org or 860-310-2583