



## **Giving a Gift of Stock**

**Electronic delivery of stock shares is the most secure and expedient delivery process available and provides efficient internal control as well as cost savings. Please follow the instructions below for making a gift of stocks or bonds.**

Additionally, please fill out the **Notification of Stock Transfer** on the following page to help ensure that it is processed accurately. Please email the completed form to Meg Clinard at [megclinard@capitaltrees.org](mailto:megclinard@capitaltrees.org) or mail to Capital Trees, 200 South Third Street, Suite 101, Richmond, VA 23219.

### 1) Transfer of Gifts Through Brokerage Accounts:

- a) A donor may instruct his or her broker to have the stock transferred directly into the Capital Trees (tax ID# 47-2998043) account with Davenport & Co. using the account information below.

Brokerage Account: Davenport & Company

Account Name: Capital Trees

Acct. #: DA\*\*\*0307

DTC#: \*\*43

For the Account of Capital Trees

Financial Advisor: Lunsford Johnson

Reference: [ insert Donor Name]

Notes: Donors should not give sell instructions to their broker. The tax court has held that the gift is not complete unless the stock is transferred into the charity's account. Mutual funds cannot be sent electronically. The transfer of mutual funds must be done by hand on paper.



**NOTIFICATION OF STOCK TRANSFER FORM**

**DONOR INFORMATION:**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

**STOCK INFORMATION:**

Name of Stock: \_\_\_\_\_  
Number of Shares: \_\_\_\_\_  
Special Instructions: \_\_\_\_\_

**BROKER INFORMATION:**

Name of Broker: \_\_\_\_\_  
Address of Broker: \_\_\_\_\_  
Date of Transfer: \_\_\_\_\_

**WIRE TRANSFER INSTRUCTIONS:**

Brokerage Account: Davenport & Co.  
Account Name: Capital Trees  
Acct. #: DA\*\*\*0307  
DTC#: \*\*43  
Broker: Lunsford Johnson 804- 780-2120  
Tax ID#: Capital Trees: 47-2998043