

MAKING A STOCK DONATION TO SAN FRANCISCO CHORAL ARTISTS

HOW A STOCK DONATION IS BETTER THAN A CASH DONATION

Let's say you purchased stock worth \$1,000 a few years ago. Today, this stock has increased in value and is worth \$5,000. If you sell it, you are responsible for capital gains tax on your profit of \$4,000, which would mean giving 20% or more to the Government.

If, on the other hand, you instead choose to donate your stock to San Francisco Choral Artists, you pay no capital gains tax at all, AND you gain a full \$5,000 Federal income tax deduction. Plus SFCA gets the full \$5,000 to use to foster music-making and support living composers.

HOW TO MAKE A GIFT OF STOCK: Three simple steps:

(1) Instruct your broker by phone, or use the Request of Transfer (sample letter #1 provided below), to perform a "electronic transfer" of the shares you wish to give. Your broker will need the following information about SFCA's brokerage account:

| | |
|-------------------------|----------------------------------------------------|
| Brokerage Name: | Wells Fargo Advisors |
| Brokerage's DTC Number: | Delivery to DTC, First Clearing Corp, #0141 |
| Name on the Account: | San Francisco Choral Artists |
| SFCA's account #: | 51710743 |
| SFCA Tax ID: | 94-2936962 |

(2) Inform San Francisco Choral Artists that the transfer has been made by emailing or mailing the Notice of Pending Stock Gift (Sample Letter #2) to

via **email**: info@sfca.org
or via **USPS mail**: San Francisco Choral Artists
PO Box 620689, Woodside, CA 94062

SFCA will acknowledge your gift and take the necessary actions to complete the transaction. Please include the date of transfer, the name of the stock, and approximately how many shares we should expect.

(3) Once the transaction is complete, you will receive a receipt from SFCA for your tax purposes. The amount of your contribution will be the value of the stock at the time of the transfer.

THANK YOU!

SAMPLE LETTER #1

**REQUEST TO TRANSFER SECURITIES
FOR CHARITABLE GIVING**

Date _____

Dear Broker,

With this letter I am instructing you to transfer the below listed shares from my account to the account of San Francisco Choral Artists. I am making this transfer as a charitable donation.

Here is the information you will need:

From my account #: _____
Name of stock(s) to be transferred _____
Number of shares _____

To Wells Fargo Advisors in the name of:

Brokerage Name: Wells Fargo Advisors
Brokerage's DTC Number: Delivery to DTC, First Clearing Corp, #0141
Name on the Account: San Francisco Choral Artists
SFCA's account #: 51710743
SFCA Tax ID: 94-2936962

Please notify me when this transfer has been completed.

Sincerely,

[Your name, contact information, and signature.]

SAMPLE LETTER OR EMAIL #2

NOTICE OF A PENDING GIFT OF STOCK

Date _____

San Francisco Choral Artists
Campaign for Music
PO Box 620689
Woodside, CA 94062

Attn: Treasurer

With this letter I am alerting you to a gift of stock I have transferred to the account of San Francisco Choral Artists:

Wells Fargo Advisors: San Francisco Choral Artists Account # 51710743

Here is the information you will need:

From my account at [insert the Name of your Broker/Company]

Name of stock(s) transferred _____

Approximate number of shares _____

Date of Transfer _____

Please send me a letter of confirmation when you have received this gift.

Sincerely,

[Your name and contact information]

Please deliver to San Francisco Choral Artists by email or USPS mail:

via **email:** info@sfca.org

or via **USPS mail:** San Francisco Choral Artists

PO Box 620689, Woodside, CA 94062