

Giving a gift of appreciated stock or securities is a way to support the La Jolla Symphony & Chorus that may provide significant tax benefits to you. These benefits may include a **charitable income tax deduction** of the fair market value of the donated stock and **elimination of capital gains tax** on stock that has appreciated. Please consult with your financial or tax advisor to help determine whether this giving option is best for you.

## **INSTRUCTIONS FOR STOCK TRANSFER**

For contributors wishing to donate shares of stock directly to the La Jolla Symphony & Chorus' investment fund from another custodian, please follow these instructions:

1. Contact Diane Salisbury, LJS&C executive director, about the intended transfer (858-822-3774) or [dsalisbury@lajollasympphony.com](mailto:dsalisbury@lajollasympphony.com) so that she can alert the LJS&C fund manager (Hokanson Associates) of the impending transfer.
2. Provide the following information to your custodian. You must reference **Charles Schwab** with the account number as shown below:

**Account Name: La Jolla Symphony & Chorus**  
**Federal Tax ID: 95-1962652**  
**Charles Schwab Account #5333-4139**  
**DTC Clearing 0164, Code 40**

Once the transfer is received, Hokanson Associates notifies the LJS&C and a tax letter is sent to the contributor acknowledging the gift. The value is determined by the average stock price on the day of the transfer.

For additional questions, please contact Diane Salisbury.