



## Instructions for Stock Share Donations

Thank you for supporting the Roanoke Cultural Endowment. The endowment is registered by the Internal Revenue Service as a 501(c)(3) non-profit organization, tax ID 47-2754436.

The easiest way to provide a gift of stock to the Roanoke Cultural Endowment is through electronic wire transfer from your brokerage account to the endowment brokerage account.

**To assist with your stock transfer donation please complete the following steps:**

1. Initiate the Stock Transfer by contacting your broker and providing the completed *Electronic Transfer Authorization Form*
2. Contact the Roanoke Cultural Endowment and provide the *Stock Donation Notification Form*

Should you not have access to the forms mentioned above please contact:

Shaleen Powell  
Executive Director  
P.O. Box 22  
Roanoke, VA 24002  
Direct: (540) 588-7489  
Email: [shaleen@roanokeculturalendowment.org](mailto:shaleen@roanokeculturalendowment.org)

**Other Information:**

- Roanoke Cultural Endowment will sell securities upon receipt.
- For internal Roanoke Cultural Endowment recognition purposes, the gift value is determined to be the average of the high and low quoted selling price during the day of receipt.
- Please consult with your tax advisor for complete tax deductibility information.

## ELECTRONIC TRANSFER AUTHORIZATION FORM – STOCK DONATIONS

**Please transfer the listed securities to the Roanoke Cultural Endowment using the account information referenced here:**

Account Name: Roanoke Cultural Endowment-Restricted  
Charles Schwab Account #: 6206-3968  
Deliver Trust Company (DTC) Clearing: 0164  
Code: 40

*For additional account information, please contact the following:*

Clearstead Advisory Solutions  
Custodian, Charles Schwab  
110 Church Avenue SW  
Suite 401  
Roanoke, VA 24011  
Attn: Caroline Wilkes  
Office: (540) 527-3700

### **Donor Information:**

Donor Name: \_\_\_\_\_

Phone No.: \_\_\_\_\_

Donor Address: \_\_\_\_\_

Special Instructions: \_\_\_\_\_

### **Stock Transfer Information:**

Donor Broker Contact Information: \_\_\_\_\_

\_\_\_\_\_

Name of Security: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

**Signed** (Donor): \_\_\_\_\_ Date: \_\_\_\_\_

**Signed** (Joint Owner): \_\_\_\_\_ Date: \_\_\_\_\_

*Thank you for supporting the Roanoke Cultural Endowment.*

## STOCK DONATION NOTIFICATION FORM

I/We intend to give the following stock to the Roanoke Cultural Endowment as a charitable contribution.

**Donor Name(s):** \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

**Date Donation was made:** \_\_\_\_\_

**Donor Brokerage Name:** \_\_\_\_\_

Contact Information: \_\_\_\_\_

**Name of Stock:** \_\_\_\_\_

No. of Shares: \_\_\_\_\_

Special Instructions: \_\_\_\_\_

\_\_\_\_\_

**Return this form to:**

Roanoke Cultural Endowment

P.O. Box 22

Roanoke, VA 24002

c/o Shaleen Powell, Executive Director

Direct: (540) 588-7489

Email: [shaleen@roanokeculturalendowment.org](mailto:shaleen@roanokeculturalendowment.org)