



Instructions for Stock Share Donations

Thank you for supporting the Roanoke Cultural Endowment (RCE). 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 RCE 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 RCE 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

Other Information:

- Roanoke Cultural Endowment will sell securities upon receipt.
- For internal RCE 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
20 Church Avenue SE
Suite 100
Roanoke, VA 24011
Attn: Caroline Pace
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: _____

Donor Acknowledgement: _____

(please print your name(s) above as you would like it to appear in our donor recognition materials)

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