



Giving Appreciated Stock

Thank you for your interest in making a gift of appreciated stock to support the Virginia Aquarium & Marine Science Center Foundation, Inc. Giving securities is an easy and tax-wise way to show your support. As the owner of stocks or bonds that have appreciated in value, selling these assets incurs capital gains taxes. Donating these securities is likely a cost-effective way to make a charitable gift.

Benefits of Giving Appreciate Stock:

- A charitable tax deduction equal to the full fair market value of the securities at the time of your gift (subject to IRS rules and limitations)
- Avoidance of the capital gains tax on the increased value
- Donating securities is easy

Making Your Gift with Appreciated Stock by Electronic Transfer:

Giving stock through electronic transfer is the easiest method to make your gift when you maintain holdings in a brokerage account. You may transfer your stock electronically to the Virginia Aquarium's clearing broker.

- Provide the following information to your transferring broker:
 - Account name – **Virginia Aquarium**
 - Account number – 6706-4979
 - Charles Schwab DTC 0164
 - Clearing Broker:
Gratus Wealth Advisors
192 Ballard Court, Suite 401
Virginia Beach, VA 23462
757-909-5500
- Please alert the Development Office at 757-385-0260 or ssavage@virginiaaquarium.com before the transfer so the Aquarium can make arrangements with its broker to receive the stock. The Aquarium cannot retain an unidentified security. The following information is required to process the transfer:
 - Donor's name
 - Name of stock and number of shares
 - Date of intended transfer
 - Indicate the purpose of the contribution

THANK YOU!

Suzanne Savage, Chief Development Officer, 757-385-0260, ssavage@virginiaaquarium.com
Virginia Aquarium & Marine Science Center, 717 General Booth Blvd., Virginia Beach, VA 23451