



## Advantages of Transferring Appreciated Stock

DreamWrights Youth & Family Theatre (D/B/A DreamWrights Center for Community Arts) qualifies as a non-profit, tax-exempt, charitable institution under section 501(c)(3) of the Internal Revenue Code. Consequently, when making a gift or a payment on a pledge, transferring appreciated securities may provide a special tax benefit to you while benefiting DreamWrights and the community. Appreciated securities are defined as stock or other securities you have owned for more than one year.

- Neither you nor DreamWrights will have to pay any capital gains taxes on the sale of the stock.
- You are eligible for an income tax deduction based on the full, fair market value of the stock.
- You will make an excellent investment in an important community resource.

For example:

- 100 shares of stock purchased in 1997 at \$25 per share cost \$2,500.
- The 100 shares are now worth \$75 per share. When the stock is transferred to DreamWrights, the value is \$7,500.
- Capital gains tax is \$0.
- The potential tax deduction is based on the \$7,500 market value of the gift of securities.

However, if you sell the stock and give the cash to DreamWrights, you may have a taxable transaction under IRS rules. To avoid adverse tax consequences, you need to transfer the stock. We suggest that you contact your personal tax advisor to discuss specific possibilities before transferring any stock.

### Making a Stock Transfer

When transferring stock to DreamWrights, contact your broker and authorize the transfer to DreamWrights, Account # **5370-1133**, c/o Wells Fargo Advisors LLC, 221 West Philadelphia Street, Suite 112 East, York, PA 17401. Your broker may also need to know the DTC number, which is 0141.

**Prior to making a transfer, you or your broker must contact Robert Bowen at Wells Fargo Advisors**, telephone number (717) 849-1058, address as listed above.

**Valuing your donation:** In order for us to correctly value your donation, please have your broker mail us the quoted selling prices on the valuation date (DreamWrights, 100 Carlisle Ave. York PA 17401). DreamWrights will acknowledge your gift's Fair Market Value as the amount of your donation, in accordance with IRS. FMV is the average of the highest and lowest quoted selling prices on the valuation date (date of gift, when stock left your ownership).

Please include directions on how you wish to be listed in our donor acknowledgements as well as your address so that we may properly thank you for your gift.

If you wish to take your stock certificates directly to their office, you may use the enclosed Letter of Authorization to Transfer Stock (also available at the DreamWrights' Office, 100 Carlisle Ave, York). Please notify the Office of your transaction by calling Ann Davis, Executive Director, at (717) 848-8623 ext: 222.

100 Carlisle Avenue York, PA 17401

[www.dreamwrights.org](http://www.dreamwrights.org)

p. 848.8623

[info@dreamwrights.org](mailto:info@dreamwrights.org)

f.848.22166

**Letter of Authorization to Transfer Stock to DreamWrights**

Date: \_\_\_\_\_

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

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

City, State, Zip: \_\_\_\_\_

Name of broker or financial institution: \_\_\_\_\_

Contact person: \_\_\_\_\_

**To Whom It May Concern:**

Please use this letter as authorization to gift \_\_\_\_\_ shares of \_\_\_\_\_  
(number of shares) (company name)  
stock to DreamWrights, Wells Fargo Advisor's account number **5370-1133** and DTC number 0141. The shares  
should be delivered to:

Wells Fargo Advisors, LLC  
Attn: Robert Bowen  
221 West Philadelphia Street, Suite 112 East  
York, PA 17401

\_\_\_\_\_ donor signature(s)

\_\_\_\_\_ print donor name(s)

If you have any questions about transferring stock or any other types of securities, please contact Robert Bowen at Wells Fargo Advisors, telephone number (717) 849-1058, fax number (717) 849-1069

Thank you.

**DONOR COPY**

**Letter of Authorization to Transfer Stock to DreamWrights**

Date: \_\_\_\_\_

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

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

City, State, Zip: \_\_\_\_\_

Name of broker or financial institution: \_\_\_\_\_

Contact person: \_\_\_\_\_

**To Whom It May Concern:**

Please use this letter as authorization to gift \_\_\_\_\_ shares of \_\_\_\_\_  
(number of shares) (company name)  
stock to DreamWrights, Wells Fargo Advisor's account number **5370-1133** and DTC number 0141. The shares should be delivered to:

Wells Fargo Advisors, LLC  
Attn: Robert Bowen  
221 West Philadelphia Street, Suite 112 East  
York, PA 17401

\_\_\_\_\_ donor signature(s)

\_\_\_\_\_ print donor name(s)

If you have any questions about transferring stock or any other types of securities, please contact Robert Bowen at Wells Fargo Advisors, telephone number (717) 849-1058, fax number (717) 849-1069

Thank you.

**BROKER COPY**

**Letter of Authorization to Transfer Stock to DreamWrights**

Date: \_\_\_\_\_

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

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

City, State, Zip: \_\_\_\_\_

Name of broker or financial institution: \_\_\_\_\_

Contact person: \_\_\_\_\_

**To Whom It May Concern:**

Please use this letter as authorization to gift \_\_\_\_\_ shares of \_\_\_\_\_  
(number of shares) (company name)  
stock to DreamWrights, Wells Fargo Advisor's account number **5370-1133** and DTC number 0141. The shares  
should be delivered to:

Wells Fargo Advisors, LLC  
Attn: Robert Bowen  
221 West Philadelphia Street, Suite 112 East  
York, PA 17401

\_\_\_\_\_ donor signature(s)

\_\_\_\_\_ print donor name(s)

If you have any questions about transferring stock or any other types of securities, please contact Robert Bowen at Wells Fargo Advisors, telephone number (717) 849-1058, fax number (717) 849-1069

Thank you.

**Wells Fargo Advisors COPY**

Please mail to Wells Fargo Advisors, LLC at the above address.