



## Securities Donation Instructions

One tax-advantaged way for a donor to give a gift to Cloverleaf Equine Center, is to donate appreciated securities.

Giving stocks, bonds, and mutual fund shares that have increased in value (and which the donor has owned for more than one year) provides donors with greater tax benefits than giving cash. Typically, the donor can deduct the full market value of the securities and avoid paying capital gains tax on the appreciation.

### Step 1: Transfer shares held at a securities firm or other brokerage account

- Provide the following instructions to your financial advisor or the institution where securities are held to transfer the shares to:

**Broker name:** TD Ameritrade

**DTC #** 0188

Account # 946207777

**Account Name:** NORTHERN VIRGINIA THERAPEUTIC RIDING PROGRAM INC

- Instruct your broker to enter identifying information (i.e. your name and address, phone number, account number, broker information) into the "Text Comment" field of the DTC screen.
- If you would like to transfer shares of mutual funds, please contact Timothy Larson at (913) 303-4341 or [timothy.larson@creativeplanning.com](mailto:timothy.larson@creativeplanning.com) to make certain that the shares can be accepted.

### Step 2: Notify Cloverleaf Equine Center of Gift

Securities donations often transfer with no accompanying donor information. In order for Cloverleaf Equine Center to identify your gift and send a tax receipt, please provide Cloverleaf Equine Center with the gift details requested below:

- Donor Name
- Donor Address
- Donor Phone
- Donor E-mail
- Name and Type of Security
- Number of Shares
- Approximate Transfer Date
- Name of Brokerage Firm

Information can be emailed to Development Director Wendy Baird at [wbaird@cloverleafequine.org](mailto:wbaird@cloverleafequine.org). You can also phone Cloverleaf Equine Center at (703) 764-0269 to provide this information.