Alexandria Seaport Foundation

Stock Gift Instructions

The specific steps and requirements for stock transfers may vary based on your location and brokerage firm, so it's crucial to consult with your broker and/or tax legal counsel for personalized guidance. Additionally, tax laws and regulations regarding charitable donations can change, so it's advisable to seek professional advice for tax-related matters.

1. Inform Alexandria Seaport Foundation - Because stock transfers often arrive without donor names, please email ASFOffice@AlexandriaSeaport.org before initiating the transfer. This ensures we can identify your gift, send you a timely tax receipt, and properly thank you! Please include the following details in your email: a) Your Full Name, b) Name of your Brokerage Firm, c) Expected Date of Transfer, d) Name of Stock & Ticker Symbol, and e) Number of Shares

.**2. Contact Your Broker** - Get in touch with your financial advisor or brokerage firm to initiate the stock transfer process. Most brokerage firms have dedicated departments or customer service representatives who can assist you with this.

3. Provide Alexandria Seaport Foundation Information - Provide your broker with the Alexandria Seaport Foundation's information, including their legal name, address, and account details for the stock transfer.

NAME	Alexandria Seaport Foundation
ADDRESS	0 Thompson's Alley, Alexandria VA 22314
PHONE	703-778-0977
EMAIL	ASFoffice@alexandriaseaport.org
BROKERAGE ACCOUNT NUMBER	Z 331 797 17 for **General Operating** Gifts Z 402 994 32 for **Capital Campaign** Gifts
DTC NUMBER	0226
BROKERAGE FIRM	Fidelity Brokerage Services
BROKERAGE CONTACT	Joseph DiGiovanni | 202-463-0496 ext 52415 | JosephDiGiovanni.team@fmr.com
EIN	54-1208614

4. Specify the Donation Amount - Communicate the number of shares or the dollar amount you wish to donate to the Alexandria Seaport Foundation.

5. Indicate the Purpose of Your Gift - Ask your broker to use the appropriate account that will indicate the purpose of your gift - either **operating** funds for day-to-day expenses or **capital** funds for the building of Seaport Center II.

6. Instruct Your Broker to Transfer the Stock - Request that your broker initiate the transfer of the specified stock to Alexandria Seaport Foundation's brokerage account. Provide any additional instructions your broker may require.

7. Verify and Confirm - After the stock transfer is completed, ask your broker to confirm the transfer in writing, which should include details such as the date of the transfer, the number of shares transferred, and the stock's current market value.

8. Tax Deduction and Receipt - Keep records of the donation, including the confirmation from your broker, as you may be eligible for a tax deduction. Consult with your tax advisor to understand the tax implications and how to claim the deduction.

9. Follow-Up - If you do not receive a confirmation from the Alexandria Seaport Foundation within 10 days, please follow up to ensure that the transfer was successful and that Seaport received your donation.