Alexandria Seaport Foundation

# Stock/Investment 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.

Members of our team are familiar with this process and here to help make this easy for you; please reach out with any questions or for assistance: ASFOffice@AlexandriaSeaport.org or 703-778-0977.

**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 and Transfer the Investment** – Get in touch with your financial advisor or brokerage firm to initiate the stock transfer process. Communicate the dollar amount or the number of shares you wish to donate to the Alexandria Seaport Foundation. Ask your broker to assist in identifying the most advantageous shares if you need guidance.

Provide your broker with the Alexandria Seaport Foundation's information below, being sure to identify the purpose of your gift: either **operating** funds for day-to-day expenses (default) or **capital** funds for the building of Seaport Center II.

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|---|---|
| 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<br>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 |

**3. 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.

***4. Follow-Up (if needed) –*** If you do not receive 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.