

STOCK / SECURITIES TRANSFER INFORMATION

When you donate stock or other securities to Stecoah Valley Center (SVC), you can take an income tax charitable deduction for the entire current value of the stock on the date it is donated (if you itemize). You can deduct the full current value of the stock that you donate, not the amount you originally paid for it. As an added bonus, when you donate appreciated securities, you will not have to pay any capital gains tax on those assets (if they have been held for more than one year). In effect, you can make a larger gift at a lower cost. For these reasons, a gift of appreciated securities may be one of the best ways for you to support Stecoah Valley Center.

How Do You Make a Gift of Securities to SVC?

There are several possible ways of making a gift of securities to SVC, depending upon whether the securities are registered in your brokerage account, in your own name, or in a bank custodian account. The procedures for executing each of these transactions are outlined below. We have also provided a sample letter of instruction that may be used to assist in the transfer of securities to Stecoah Valley Center.

For securities held in a brokerage account: Securities held by a broker may be delivered by wire through the Depository Trust Company (DTC) to our brokerage account. This electronic transfer is the most popular and most efficient way to donate securities to SVC.

To arrange this transaction, provide your broker with written authorization of your intention to make a gift of securities to Stecoah Valley Cultural Arts Center. Be sure to tell them the name of the stock that you want to transfer and the number of shares. (Please see the sample letter of instruction.) Also, your broker will need the following information in order to execute your request:

Brokerage: Edward Jones

DTC #: 0057

Account Name: Stecoah Valley Cultural Arts Center, Inc.

Tax ID #: 56-1935344

Account #: 47314771

For securities held in a bank custodian account:

Many banks have a gift account procedure whereby securities may be removed from your custodian account and placed in a gift account until instructions have been received from the charity. If you wish to make a gift of securities from your bank account, please notify your bank and also inform us of the name of the bank and the contact person.

For ALL transactions:

Regardless of the method that you choose to deliver a gift of securities, please notify SVC of your intention to donate securities prior to the transaction, so that we may alert our broker and ensure that your generosity is acknowledged accurately and promptly. For auditing and acknowledgement purposes, please include your name and complete address and the name and number of shares of the stock that you are donating. We have provided a sample letter of instruction * to help you create the necessary documentation.

For More Information:

If you have any questions, or if you need any additional information, we recommend that you consult with your tax or financial advisor to discuss your specific situation. If you need additional information regarding the transfer, please contact Kate Parkerson at SVC, 828-479-3364

Thank you for your interest in supporting Stecoah Valley Cultural Arts Center!

SAMPLE LETTER OF INSTRUCTION

Date

Donor's Name

Donor's Address

Broker/Banker Name

Company Name

Address

Phone Number

Re: Donor's Account Number

To Whom It May Concern:

I would like to make a donation of (#) of shares of (Company Name) common stock from my account (# _____) to Stecoah Valley Cultural Arts Center.

You may transfer the above shares to the following account:

Brokerage: Edward Jones

DTC #: 0057

Account Name: Stecoah Valley Cultural Arts Center, Inc.

Tax ID #: 56-1935344

Account #: 47314771

Thank you.

Sincerely,

[Donor Signature]

cc: Kate Parkerson, SVC

121 Schoolhouse Rd., Robbinsville NC 28771

(FAX: 828/479-1434; E-mail: kate@stecoahvalleycenter.com)