

Appreciated Securities FAQs



Arlington Neighborhood Village
Neighbors Helping Neighbors Age in Place

Q: What are publicly traded securities?

A: Publicly traded securities are stocks, bonds, ETFs, and mutual funds sold in public markets like the New York Stock Exchange.

Q: Can I give a specific dollar amount of securities?

A: No, you must donate a specific number of shares, not a dollar amount.

Q: Can I sell the securities and donate the proceeds to the Village?

A: Yes, but you'll lose the tax benefits of donating appreciated securities.

Q: Do I need to let the Village know about my gift?

A: Yes, please inform us. Exchanges often do not notify the Village of a transfer's origin.

Q: How do I give securities held in a brokerage account?

A: Contact your broker for a charitable gift transfer form and complete it. Provide the following details for the Village's account: Arlington Neighborhood Village, Inc.; Federal Tax ID/EIN 46-3591812; **Account #; DTC #; Brokerage address**. Your broker will handle the rest.

Q: How do I give securities held in certificate form?

A: Along with your original stock certificate(s), you will need to obtain a transfer of stock ownership form (stock power) for each certificate from the company's investor relations office. Follow instructions on the certificate(s) and form carefully.

Deliver the certificate(s) and the completed stock power(s) to the Village office, Monday through Friday, 9 am to 5 pm, by appointment.

Alternatively, mail the certificate(s) and stock power(s) in two separate certified mail envelopes to: Arlington Neighborhood Village, Inc.; 4000 Lorcom Lane, Arlington VA 22207. Please

remember to use two envelopes, as whoever holds both the certificate(s) and the stock power(s) has control of the shares.