Asheville Community Theatre

35 EAST WALNUT STREET * ASHEVILLE, NORTH CAROLINA 28801

STOCK TRANSFER FORM

Due to privacy rules in the brokerage industry, our broker cannot always determine the identity of the originator of the stock transfer. We, therefore, ask donors to notify Asheville Community Theatre when you plan to make a gift of stock or securities so that we can watch for its arrival in our brokerage account.

Please print this form and mail to:
Asheville Community Theatre
PO Box 100
Swannanoa, NC 28778

Or email to:
susan@ashevilletheatre.org

Please complete the form below. This information will assure that an accurate receipt is issued in a timely manner and you, the donor, receive acknowledgement for tax purposes.

Name and Type of Securities (e.g. IBM Common Stock): _____

Number of Shares: _____ Date of Transfer: _____

Donor's Name: _____

Donor's Street Address: _____

Donor's City/State/Zip: _____

Donor's Phone:_____

Broker's Name: _____

Broker's Company: _____

Broker's Phone #: _____

The following information is provided to assist you and/or your broker with this process:

- Asheville Community Theatre's broker contact information is: Jacques Fogel at Fogel Investment Advisory Group: (828) 768-5225
- ACT's Fidelity Investment account is #636-348570. Stock can be transferred to that account. *Our policy is to sell the stock as soon as we receive it to realize the full value of the gift given by the donor.*
- For Electronic transfers of DTC eligible stocks, Fidelity's DTC number is 0226.
- Asheville Community Theatre is a 501 (c) (3) organization.
- Asheville Community Theatre's tax identification number (EIN) is: 56-6002669

After Asheville Community Theatre receives this form and the donation of securities is confirmed by our broker, we will issue an acknowledgement letter to the donor. This letter will indicate the number and type of shares received and the date the stock was converted into a gift (day when record ownership was transferred to Asheville Community Theatre or the stock was unconditionally delivered to Asheville Community Theatre.) All contributions are tax deductible to the fullest extent provided by law. Please contact your tax advisor for complete tax deductibility rules.