

**University of Virginia
Darden School Foundation**

P. O. Box 7726
Charlottesville, VA 22906
(800) DARDEN3 – Toll Free
(434) 982-2338 – Fax

GIFTS OF STOCK INSTRUCTION SHEET

Making A Gift of Appreciated Securities

Securities are the most common form of property given to non-profit institutions. The Darden School Foundation encourages gifts of stock, bonds, and shares of mutual funds. With a gift of appreciated securities held for the required holding period, donors are entitled to a charitable deduction for the full fair-market value (FMV) of the stock in the year of the gift. The FMV is determined by the mean of the high and low sales prices on the date the stock is received by Darden. For details regarding the tax implications of your gift, please contact your tax advisor.

For more information on making a gift, please contact the Office of Development by phone at 800-327-3363 or by email at smithca@darden.virginia.edu.

UVA Darden School Foundation Brokerage Information

Wachovia Securities/First Clearing Corporation
P. O. Box 60
401 East Market Street, Suite 200
Charlottesville, VA 22902
Phone: 434-977-4820
Toll Free: 800-944-3082
Fax: 434-977-0713

UVA Darden School Foundation Information

Office of Development
P. O. Box 7726
Charlottesville, VA 22906
Phone: 434-924-4603
Toll Free: 800-327-3363
Fax: 434-982-2338
Email: smithca@darden.virginia.edu

Making a Gift of Stock

Increasingly, gifts of stock are becoming a vehicle of choice for Darden School supporters. Stock gifts are made through the UVA Darden School Foundation, the charitable organization that raises private monies for the school, using one of three methods:

Broker to Broker Transfer

The quickest and most secure method is to transfer stock from the donor's broker to the school's broker through the Depository Trust Company (DTC). Make the transfer to DTC #141 (Wachovia Securities/First Clearing Corporation) for credit to account #7967-9300, UVA Darden School Foundation.

Please notify the Darden School Foundation Gift Coordinator by e-mail at smithca@darden.virginia.edu so that Darden will know who has made the gift.

Direct Transfer to Darden

Donating a stock certificate in the donor's name requires sending a stock power signed by the donor, (or the certificate with the donor's signature on the back), transferring the stock to the UVA Darden School Foundation, plus a letter of authorization from the donor stating the number of shares contributed, the name of the security, and the certificate number, to the Darden School Foundation Finance Office by registered mail or overnight courier. The letter must be signed exactly as the donor's name appears on the certificate. The Foundation's Federal Tax ID number is 54-6046419.

Securities Registered to Darden

Donating securities registered in the name of the UVA Darden School Foundation requires sending the certificate to the Foundation Office of Development by registered mail or overnight courier.

Note: The value of your stock will be recorded at the mean value on the date it is received in the UVA Darden School Foundation account.