FOUR SEASONS
FOUNDATION

Gift of Stock - Instructions

Depending on your personal situation, a gift of appreciated securities (held for at least one year and one day) may provide you with significant advantages as you support the Four Seasons Foundation. Talk with your tax or financial advisor to discuss the best strategy for making a gift of appreciated assets.

Benefits to you can include:

- A charitable tax deduction for the full market value of the donated securities.
- Eliminating state and capital gains tax on securities that have increased value since you purchased them.
- Potentially making a larger gift using an appreciated asset that you could if you were contributing cash.

If you are giving stock, please notify Stephanie Wilson at 828.513.2440 or at **SWilson1@FourSeasonsCFL.org** with the name and number of shares transferred so we may correctly identify, credit, and acknowledge your contribution, as the names of donors are often not provided in a stock gift transaction.

Electronic Delivery Instructions
FBO: Four Seasons CFL
Edward Jones Account Number: 258-20952-1-8
Financial Advisor: Laura Mukosiej (828) 694-3629
DTC: 0057

Four Seasons Foundation
Federal Tax Identification Number: **#47-5508988**

Deliver to:
235 St. John Rd, Suite 15A
Fletcher, NC 28732

Time Sensitive
IRAs: Individuals aged 70 ½ or older are allowed to make a direct transfer to Four Seasons Foundation without having to count it as income for federal income tax purposes.

Qualified Charitable Distributions: Individuals aged 70 ½ may use a Traditional IRA to make a Qualified Charitable Distribution (QCD) of up to $105,000 to give directly to charity tax-free, allowing you to give more to your favorite charities and possibly minimize your taxes.

Questions regarding any securities transfer should be directed at Laura Mukosiej at Edward Jones (828) 694-3629.

Information provided by Four Seasons Foundation is not intended as financial, legal or tax advice. As always, please consult your tax advisor.

Four Seasons Foundation is a tax-exempt non-profit organization.
Federal Tax ID # 47-5508988