



GIFTS OF STOCK OR OTHER SECURITIES

Thank you for supporting TAP with a gift of stock or other securities.

Such a gift is a meaningful way to support our mission while potentially enjoying tax benefits.

This guide provides instructions on how to make your gift and answers common questions you may have.

Instructions for Gifts of Securities

Notify TAP of your intention to make a gift of stock or other marketable securities. This allows us to anticipate the incoming donation and provide you with any specific instructions or documentation.

- Phone: 540.283.4809
- Email: Giving@tapintohope.org

The following information will be needed:

- Donor's name and contact information
- Broker's name, firm name, and contact information
- Stock name/symbol
- Number of shares or bonds/approximate value

TAP's Broker Contact Information

Clearstead Advisory Solutions

- Primary Contact: Steve Bowery, 540.527.3700
- TAP Tax Identification Number: 540.605.7095

Additional Information

- TAP will sell securities upon receipt.
- Stock gifts are typically valued based on the average of the high and low trading prices on the date of the transfer.
- Please consult your financial advisor or tax professional regarding the potential tax benefits and implications of your gift. They can help you determine the best assets to donate and guide you through the process in accordance with your financial goals.

Note to Donors: Thank you for your generosity. This form will facilitate the timely acknowledgement of gifts of stock and other securities. These contributions normally involve transferring securities directly from your brokerage account to a TAP brokerage account. Your broker's confidentiality rules may require your expressed permission to release this information.

If you are planning to make a stock gift, please complete this form and send it to TAP by mail (**TAP, Director of Fund Development, 302 2nd Street SW Roanoke, VA 24011**) or email (Giving@tapintohope.org). Alternatively, you or your broker may call us at **540.283.4809** and provide the information by phone.

Note to Brokers: If you would like to discuss the sale of specific shares of a security, please use the contact information above. In your confirmation of trade, please include the high and low price of the security on transfer date, as well as the average.

TAP is a charitable corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. Donors may deduct contributions to TAP as provided by Section 170 of the Internal Revenue Code, and bequests or gifts to TAP are deductible for Federal Estate and Gift Tax purposes under Sections 2055 and 2522 of the Code. For specific application of charitable tax laws, consult your attorney or financial advisor.

STOCK/SECURITIES GIFT FORM

- Donor's Name: _____
- Donor's Phone: _____
- Donor's Address: _____

- Stock Name and Symbol: _____
- Number of Shares or Approximate Value: _____
- Expected Date of Transfer: _____
- Gift Designation: _____

• Broker/Advisor Name: _____

• Brokerage Firm: _____

• Broker Phone Number: _____

• Broker Email: _____