

Donating Appreciated Stock

Gifts of appreciated stock can be a meaningful way to support The Art Museum of Eastern Idaho while potentially offering tax advantages. If you hold appreciated securities in a taxable investment account, please consult your financial advisor and tax professional to determine whether a stock donation is appropriate for your situation.

Before initiating a transfer, please gather the following information:

- Account Number
- Ticker symbol of your investment
- Quantity of shares
- Tax lot date(s).

Contact your investment institution to begin the transfer. They will provide the required forms or online process. Please give your institution the following delivery instructions so the stock can be transferred to The Art Museum of Eastern Idaho:

ACATS Transfer: National Financial Services, LLC

DTC Clearing Number: 0226

For nonnegotiable securities, deliver to:

- National Financial Services LLC
- 499 Washington Blvd, Fifth Floor
- Jersey City, NJ 07310
- For benefit of: The Art Museum of Eastern Idaho
- For further credit to: Newly created investment account number