



GIFTS OF SECURITIES TO THE HERITAGE FOUNDATION OF WILLIAMSON COUNTY, TN

If you have highly appreciated stock or mutual fund shares, we encourage you to consider these assets for your gift to the Heritage Foundation. A charitable gift of stock or mutual fund shares may offer several benefits to you and the Foundation. First, you avoid paying the capital gains tax on the increase in the value of your stock or mutual fund shares. Second, you may receive a tax deduction for the full fair market value of those shares on the date of the gift. Lastly, you will enable the Heritage Foundation to sustain the historic charm that makes Williamson County so beloved.

HOW DO I TRANSFER GIFTS OF SECURITIES? There are several ways to transfer appreciated securities to the Heritage Foundation. The best method for you will depend upon how you hold the securities.

- **Electronic Transfer:** If the securities are held in a brokerage account, you can make a simple paperless transfer from your account to the Heritage Foundation's brokerage account with B. Riley Wealth. The pertinent information for the account is as follows:

B. Riley Wealth

Account Name:	Heritage Foundation of Williamson County, TN
Account Number:	7456-2285
DTC#:	0141
Federal Tax ID Number:	23-7042596

Please email or call Grant Martin, Chief Advancement Officer, gmartin@williamsonheritage.org or (615) 591-8500 prior to the transfer of securities to let him know that arrangements are being made.

- **Stock Certificate:** If you hold the certificate, please send the unendorsed certificate by certified mail to: Heritage Foundation of Williamson County, TN, Attention: Grant Martin, 112 Bridge Street, Franklin, TN 37064. In a separate envelope, mail a signed stock power form with a guaranteed signature to the Heritage Foundation of Williamson County, TN along with a cover letter outlining any restrictions, if any, associated with the gift.
- **Mutual Fund Transfer:** Each mutual fund has its own method of transferring fund shares. Please contact the customer service representative at your mutual fund institution for instructions or you may contact Grant Martin, and he will request the necessary paperwork.

Once the transfer has taken place, the Heritage Foundation will forward the appropriate documentation to you that the transfer of securities has been completed.

WHAT IF I OWN DEPRECIATED STOCK? If you have depreciated stock and wish to use it in making a contribution to the Heritage Foundation, sell the stock and contribute the proceeds to the Foundation. Then take the loss from the sale of the stock and apply it to your current income tax situation. In addition, the gift you made to the Heritage Foundation can be used as a gift credit deduction.