

How to Donate Appreciated Stocks and Securities

A Step-by-Step Guide

Thank you for considering a gift of appreciated securities to Community Foundation of Rutherford County (CFRC). Donating publicly traded securities can be one of the most tax-efficient ways to support the charitable causes you care about while potentially maximizing your tax benefits.

The following steps will help ensure your gift is transferred promptly and accurately.



Step 1 – Notify CFRC of Your Intended Gift

- Please notify us of your plan to donate appreciated securities by contacting us using any of the following methods:
 - In person | Email: info@cfrutherford.org | Phone: (615) 210-1037

Step 2 – Contact Your Financial Advisor or Brokerage Firm

- Contact your financial advisor or brokerage firm and let them know you wish to donate appreciated securities to Community Foundation of Rutherford County (CFRC). Be prepared to provide:
 - Name of the Security and Ticker Symbol (if applicable)
 - Number of Shares (or Units) to Transfer

Step 3 – Instruct Your Broker to Transfer the Securities to CFRC

- Ask your broker to transfer the securities and list the recipient as follows:
 - EIN: 41-2732193
 - Community Foundation of Rutherford County, Inc.
1784 W. Northfield Blvd., #383
Murfreesboro, Tennessee 37129-1702

Step 4 – Provide Your Broker with CFRC's Transfer Instructions

- Provide your financial advisor or broker with the CFRC transfer instructions below.
- Your broker will use the following information to electronically transfer the securities to CFRC's brokerage account.
 - Raymond James Brokerage Account – DTC #0725
CFRC Brokerage Account Number: Provided by CFRC's Broker, Raymond James
Rick LaLance, SVP – Rick.LaLance@pnfp.com – (615) 849-2254
Kim Mankin, Director of Client Services – Kim.Mankin@pnfp.com – (615) 849-2250

Step 5 – Transfer of Securities is Complete

- Transfers generally take one (1) to five (5) business days, although processing times may vary by brokerage firm.

Step 6 – Confirm Receipt with CFRC

- Once the transfer is complete, CFRC will confirm receipt of the securities. Questions regarding receipt of securities may be directed to Kelly G Rollins, President, at kelly@kellyrollins.com or (615) 210-1037.
- Upon receipt of the transferred securities, CFRC will provide a Contemporaneous Written Acknowledgment (CWA) for your tax records. In accordance with IRS requirements, the acknowledgment will identify the securities received and the date of the gift but will not assign a dollar value. Your tax advisor will determine the charitable deduction based on applicable IRS rules.

Step 7 – Sale of Securities by CFRC

- CFRC will sell the donated securities in accordance with its Gift Acceptance and Investment Policies.

Community Foundation of Rutherford County, based in Murfreesboro, Tennessee, is a tax-exempt public charity recognized under Section 501(c)(3) of the Internal Revenue Code. CFRC does not provide legal, tax, or financial advice and encourages donors to consult with their professional advisors before making a gift of appreciated securities.