



## **GIFTS OF SECURITIES TO THE ADVENTURE SCIENCE CENTER**

If you have highly appreciated stock or mutual fund shares, we encourage you to consider these assets for your gift to Adventure Science Center. A charitable gift of stock or mutual fund shares may offer several benefits to you and the science center. First, you avoid paying the capital gains tax on the increase in 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 science center to enhance the museum experience for its visitors.

### **HOW DO I TRANSFER GIFTS OF SECURITIES?**

There are several ways to transfer appreciated securities to the science center. 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 Adventure Science Center's brokerage account with Wiley Brothers. The pertinent information for the account is as follows:

#### **Wiley Brothers**

Account Name:	Adventure Science Center
Account Number:	6H6-031683
DTC#:	0443
Federal Tax ID Number:	62-479192

Please email or call Grant Martin, Chief Development Officer, [gmartin@adventuresci.org](mailto:gmartin@adventuresci.org) or (615) 401-5054 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: Adventure Science Center, Attention: Grant E. Martin, 800 Ft. Negley Boulevard, Nashville, TN 37203. In a separate envelope, mail a signed stock power form with a guaranteed signature to Adventure Science Center 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 Mr. Martin, and he will request the necessary paperwork.

Once the transfer has taken place, Adventure Science Center 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 Adventure Science Center, sell the stock and contribute the proceeds to the science center. 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 science center can be used as a gift credit deduction.