



## *Making a Stock or Mutual Fund Gift to ACHS*



Thank you for considering a transfer of securities as a donation to the Adams County Historical Society (ACHS).

To electronically transfer the securities to us:

1. Notify ACHS by email, phone, or in person of the name(s) of the securities you wish to transfer, the exact number of shares, the CUSIP number for each stock or fund (if available), the name of your brokerage firm (i.e., Edward Jones, Charles Schwab), and, if possible, your account number with the brokerage firm.
2. We will forward this information to our financial advisor's office, who will then provide specific DTC (Depository Trust Corporation) electronic transfer instructions, which you will give to your broker. Your broker will then initiate the transfer from their holding account to ours.
3. You will receive an acknowledgment letter from us when the transfer is complete.

If you wish to transfer a dollar value of securities, as opposed to a specific number of shares, we suggest that you ask your broker to liquidate the shares and have them send us a check for the amount you are donating.

If you wish to donate paper stock certificates, do not endorse the certificates. Please contact us for the correct procedure.

All donated shares will be liquidated on our end and the cash incorporated into our managed portfolio.

If you have any questions or concerns, you are welcome to reach out to our Executive Director, Andrew Dalton, at [director@achs-pa.org](mailto:director@achs-pa.org) or 717-334-4723.

*ACHS is a registered, 501(c)(3) nonprofit organization with EIN# 23-7258494. All gifts are tax-deductible to the extent permitted by law. No goods or services are provided in return for charitable donations.*

*This summary was prepared for the Adams County Historical Society by Ray Mann, CPA, LTD.*

**Adams County Historical Society • 625 Biglerville Road • Gettysburg, PA 17325**