



Instruction to Donate Securities **(to Westchester Symphonic Winds)**

Donation of securities held in your brokerage account or trust:

(If you are donating mutual fund shares or securities held in person please contact us. The procedure is slightly different)

- Write a letter to your broker or trustee authorizing him/her to transfer the securities you would like to donate to WSW's account at TD Ameritrade. Remember to include the name listed on your account, your account number, name of security to be donated, and the number of shares to be given. You should also list the date on which you would like the gift to be made. Finally, remember to sign the letter over a printed copy of your name and include your address, email address and telephone number. We have created a form you may use to fill in all the above information. It includes all the account number information that you will need to make the donation. Please contact our treasurer (see below for ways to reach her) to obtain forms.
- Then send the letter or the form to your broker or trustee and send a copy to Marjorie Hone, WSW Treasurer, at Westchester Symphonic Winds, 333 Mamaroneck Avenue Box 485, White Plains, New York 10605. If you have questions you may reach her at margehone@gmail.com or 914-591-6851.
- Once the information is received and our broker confirms the donation we will issue an official acknowledgment. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift.

Note: It is important that WSW receives the securities (stock or mutual fund shares) before they are sold so the giver will not have to pay any capital gains tax on any appreciation. If a broker will not accept a given mutual fund company's shares, the giver must sell the shares prior to donating the proceeds to WSW.