

## Instructions for Stock Gift Transfers to the Garde Arts Center



We can accept gifts of publicly traded stocks and bonds, including appreciated securities and closely held stocks (the latter subject to review and approval). Gifts of appreciated stocks qualify for an income tax deduction equivalent to current market value of the stocks (as determined by IRS rules and regulations). The date for establishing the gift value of a stock is the day the shares enter the Garde's account.

Gifts of publicly traded stocks held at a brokerage can be electronically transferred to us by your financial agent or bank. Here is the information your agent will need to perform the transfer:

Account name: The Garde Arts Center, Inc.  
Account number: ABM138611  
DTCC Number: 0443  
Tax ID Number: 06-1143582  
Osaic Institutions clearing through Pershing LLC

Contact information:  
Zoe Willis  
Financial Sales Associate  
Osaic Institutions  
Chelsea Groton Financial Services  
2 Water Street  
Mystic CT 06355  
O: (860) 572-4042 | F: (860) 572-4056

To ensure proper receipt and acknowledgement of your gift of stock, please contact Jeanne Sigel, Marketing & Development Director at [jsigel@gardearts.org](mailto:jsigel@gardearts.org) or 860-961-4106.