

Instructions to provide your broker:

Gifts of Stock

Giving publicly traded shares of stock to the Sharlot Hall Museum allows you to turn an appreciated asset into support for the Museum. You'll receive a charitable income tax deduction for the fair market value of your gift, and as a qualified non-profit, the Sharlot Hall Museum can then sell the stock without having to pay capital gains tax. All the proceeds from the sale will be used for the charitable purposes you specify. You can designate your gift for general purposes or to support a particular initiative.

1. Send a letter of instruction to your broker indicating that you wish to make a stock gift to the Museum, specifying the name of the stock, the number of shares (or dollar amount) and gift designation. Some brokers may provide/require a specific form for a gift transfer.
2. Share a copy of your letter with Finance Manager, David.Hernandez@SharlotHallMuseum.org
This is to ensure timely and proper crediting of your gift intention.
3. Instruct your broker to transfer the shares electronically via DTC (Depository Trust Company). Please email David.Hernandez@SharlotHallMuseum.org or phone 928-277-2010 to obtain DTC# and Account# for the transfer.

Thank you for this amazing gift of support to the Sharlot Hall Museum!