**Gifts of Appreciated Stock**

Stock gains can be put to good use by reinvesting in the community. Giving stocks, bonds and mutual fund shares that have increased in value (and which the donor has owned for more than one year) provides a greater tax benefits to donor than giving cash. Not only can the donor deduct the full market value of securities but also avoid paying capital gains tax on the appreciation.

**Instructions for Giving Stock to EVMS**

- Please ask the donor to inform Office of Development that a gift will be transferred to EVMS Foundation (see stock gift form). The following information is requested:
  - Donor’s Name & Contact Info
  - Broker’s Name, Firm & Contact Info
  - Stock Name/Symbol
  - Number of Shares/Approx. Value

- EVMS Foundation’s preferred broker
  - Morgan Stanley Smith Barney 222 Central Park Ave, #1800, Virginia Beach, VA 23462
  - Phone: 757-493-2100 Fax: 866-766-4930
  - Primary Contact: Larry Burroughs 757-493-2106
  - Team Support (Direct #s): Betsy Mansebo (757-473-2121); Shandra Smith (757-493-2137)
  - Account Number: 529-026390-040
  - Delivery Trust Company (DTC) No. 015
  - EVMS Foundation Tax ID # 23-7053028

- EVMS Foundation has alternate broker accounts at other firms, for more information contact the Office of Development at 757-965-8500.

- Gift Value/Sale
  - The gift value for Internal Revenue Service declaration will be the median of the high and low selling price of the stock or bond on the date of the gift. EVMS Foundation will sell stocks/bonds upon receipt.
Eastern Virginia Medical School Foundation

Stock Gift Form

Brokerage Firm: 

Account Name: Eastern Virginia Medical School Foundation

Account Number: 

DTC: 

Contact Name: 

Contact Number: 

Stock Name/Symbol: 

# of Shares/Approx Value: 

Donor’s Name: 

Donor’s Phone: 

Donor’s Address: 

Please Note Any Donor Instructions: 

Note to Donors:

Thank you very much for your generosity on behalf of Eastern Virginia Medical School. This form was designed to facilitate the timely acknowledgement of charitable gifts of stock and other securities. These types of contributions normally involve transferring securities directly from your brokerage account to an EVMS Foundation brokerage account. In order to properly acknowledge your gift and provide the receipt you will need for the IRS, we will need to know your name and address, and which shares you transferred. Your broker’s confidentiality rules may require your expressed permission to release this information. If you are planning to make a stock gift, please complete this form and send it to the EVMS Foundation by mail (EVMS Foundation, P.O. Box 5, Norfolk, VA 23501) or fax (757-961-6700). Alternatively, you or your broker may call us at 757-965-8500 and provide the information by telephone.

Note to Brokers:

The EVMS Foundation’s Treasurer’s Office is the authorized office to make stock trades and to establish new accounts on behalf of the EVMS Foundation. If you would like to discuss the sale of specific shares of a security or the creation of a new brokerage account, please contact Ms. Helen S. Heselius, Assistant Treasurer of the EVMS Foundation, at (757) 446-6065, or email her at heselihs@evms.edu.

The Eastern Virginia Medical School Foundation is a charitable corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. The Internal Revenue Service has determined that the EVMS Foundation is a public charity and not a private foundation within the meaning of Section 509(a) of the Internal Revenue Code. Donors may deduct contributions to the Foundation as provided by Section 170 of the Internal Revenue Code, and bequests or gifts to the Foundation are deductible for Federal Estate and Gift Tax purposes under Sections 2055 and 2522 of the Code. For specific application of charitable tax laws, you are encouraged to consult your attorney or financial advisor.