



How to make gifts of Stock

By giving appreciated property like stocks or bonds, you can avoid paying capital gains taxes on the appreciation, receive a tax deduction for the full market value of the gift, and support the Chelan-Douglas Land Trust at a lower cost to you.

Step 1: The Broker

Ask your broker to make a direct electronic transfer of the stock to the Land Trust's account using the following information:

Our Brokerage information:

DTC # 0793

Account #66600057

Account name: Chelan-Douglas Land Trust

Stifel Nicolaus

1 Fifth Street, Suite 300

Wenatchee, WA 98801

Investment Assistant: Zach Davies

(800) 933-5521 or (509) 663-8604

Our Tax ID # 91-1331348

Step 2: The Land Trust

Please notify us as soon as your transfer instructions have been given to your broker. Your broker may not include your name in the transfer, and we cannot properly acknowledge or record your gift without knowing the source of the donation. Please provide your name and address, the name of the security or securities being transferred, the number of shares, and the approximate value. To notify us please contact Sharon Lunz, Communications & Development Director, at (509) 667-9708 or sharon@cdlandtrust.org.

Thank you for your support of the Chelan-Douglas Land Trust!

CHELAN-DOUGLAS LAND TRUST

email: cdlt@cdlandtrust.org • web: www.cdlandtrust.org

PHONE: 509.667.9708 • Fax: 509.667.0719 • P.O. Box 4461 • WENATCHEE, WASHINGTON 98807-4461