



## How to Donate Securities to Dallas Chamber Symphony

Thank you for considering a donation of securities to support the Dallas Chamber Symphony! Donating stocks, bonds, or other securities can be a tax-efficient way to support our work. Here's how to make your gift:

### Step 1: Inform Your Broker

1. Contact your broker or financial advisor to initiate the transfer of securities to Dallas Chamber Symphony.
2. Provide your broker with the following information to complete the transfer:
  - **Receiving Nonprofit Name:** Dallas Chamber Symphony
  - **Receiving Brokerage:** Charles Schwab
  - **DTC Clearing Number:** 0164, Code 40
  - **Account Number:** 5442-1146
  - **Tax ID (EIN):** 45-3543901

### Step 2: Notify the Dallas Chamber Symphony

1. After initiating the transfer, please inform us to ensure that we can properly acknowledge your gift. You can notify us by:
  - **Email:** Development Director - Chris Denney, [chris.denney@dcsymphony.org](mailto:chris.denney@dcsymphony.org)
  - **Phone:** (214) 449-1294; x 903
2. Include the following information in your communication:
  - Your name and contact details
  - Name of the securities being transferred
  - Approximate value of the gift
  - Date of the transfer

### Step 3: Tax Documentation

- Once we receive your gift, we will send you an official acknowledgment letter for your records. This letter will include the date we received the securities and a description of the gift, which you can use for tax purposes.
- If you are donating securities that have appreciated in value, you may be able to avoid capital gains taxes and deduct the full fair market value on your income taxes. We recommend consulting with your tax advisor to fully understand the benefits.

### Important Deadlines:

- **End of Year Giving:** Please initiate your securities transfer by December 20th to ensure it is processed before the end of the year for tax purposes.

If you have any questions or need assistance with your donation, please contact Chris Denney at the Dallas Chamber Symphony, 214-449-1294 x 903 or [chris.denney@dcsymphony.org](mailto:chris.denney@dcsymphony.org). Thank you for your generosity and support of the Dallas Chamber Symphony!