



Make a Stock Donation

JABA welcomes gifts of marketable stocks or mutual fund shares. These gifts have an immediate impact on our ability to serve clients in need – and may also create an income tax deduction for you based on the assets' current value. You may direct your gift to a specific program or leave it undesignated to support our clients in greatest need. The entire transaction can be handled electronically — saving you time and effort.

There are two ways to donate stocks: electronic transfer by sending stock certificates and stock powers. Please contact JABA's Philanthropy Office (434.817.5221) with questions.

Electronic Transfer. Giving stock through an electronic transfer is the easiest method if you maintain holdings in a brokered account. Depository Trust Company (DTC) is the clearinghouse for electronic security transfers. Each brokerage firm has a specific DTC number. When you wish to make a stock gift, provide the following information to the transferring broker:

Account name: Jefferson Area Board for Aging, Inc.
Account Number: DA1299175
Agent Name: Pershing on behalf of Davenport & Co., LLC
Agent DTC Number: 0443
Reference: (Donor's Name)

To facilitate the transfer, ask your broker to call David Dunwody at Davenport & Company, LLC (434.245.1548) and provide: number of shares; CUSIP (9-character alphanumeric code that identifies each specific North American financial security); broker DTC number; broker name; and donor name. JABA's agent cannot sell an unidentified security. *Before* the transfer occurs, please indicate the purpose of the gift by calling JABA's Philanthropy Office (434.817.5221). Purpose may be an unrestricted gift or a gift to a specific program or determination.

Stock Certificates and Stock Powers. If you send a stock certificate that is in your name, a letter of intent must be included. Stock powers are available from any broker. Make sure your signature on the stock power is medallion guaranteed by a bank or broker, not notarized. **Note of importance:** You must mail stock certificates and stock powers separately. If the certificate is in JABA, Inc.'s name, no stock power is needed. The process for re-registering stock certificates (transferring the certificate into JABA, Inc.'s name) can take from two to four weeks. Stock certificates should be sent to:

Jefferson Area Board for Aging, Inc.
Philanthropy Office
674 Hillside Drive, Suite 9
Charlottesville, VA 22901

If the certificates have been registered to Jefferson Area Board for Aging, Inc., a letter should be included identifying the donor and the purpose of the gift.