



Please complete the information below to notify the Capital Region Land Conservancy (CRLC) of your gift and help ensure it is processed accurately. Please mail or email the completed information to P.O. Box 17306, Richmond, VA 23226 or parker@capitalregionland.org.

Donor & Securities Information:

Name & Type of Securities	Security Symbol	# of Shares	Transfer Date
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Donor Name (Individual, Corporation, Foundation)

Donor Street Address

Donor City / State / Zip

Broker Name

Broker Company / City / State

Broker Contact / Telephone Number

Donor Telephone / Email Address

Donor Signature

Date Signed

Donor Signature

Date Signed

NOTE – All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

Thank you again for considering CRLC as the recipient of your charitable gift.



Thank you for your interest in making a charitable gift to the Capital Region Land Conservancy (CRLC) in the form of a Stock Transfer.

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to CRLC. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to CRLC (Tax ID# 20-2797635), please note the following:

- Brokerage House: Charles Schwab
- Account Name: Capital Region Land Conservancy
- Account Number: 3846-2278
- Financial Advisor: Canal Capital Management, LLC, 9 South 5th Street, Richmond, VA 23219
- Telephone Number: (804) 325-1450
- DTC Number: 0164
- Reference: Donor Name (Including your name will ensure your gift is properly acknowledged.)

Revised 01/01/2024