

Donating Stocks and Securities

Thank you for your interest in supporting the Farmington River Watershed Association (FRWA) through stock donation. Appreciated securities are perhaps the most cost-effective assets to use in making a gift. When you transfer ownership of long-term holdings to FRWA you receive a charitable deduction for their full market value and you incur no capital gains tax (subject to IRA deduction limits).

Because electronic transfers are made without identifying the donor, **please alert us in advance about the stock and number of shares you plan to give.** You can do so by e-mailing ddonaldson@essex.financial or calling David Donaldson at 860 284 6379.

According to IRS regulations, the date of your gift corresponds to the date it arrives in our possession (for transfers from brokerage account to brokerage account). The following is the information necessary to transfer stock to our account

Organization Account Name: Farmington River Watershed Association

Organization Tax ID Number: 06-0741585

Organization Account Number: 5Y9041154

Broker DTC Number: 0443

Investment Advisor Clearing Firm: Pershing LLC

1 Pershing Plaza

Jersey City, NJ 07399