



# THE UMBRELLA<sup>SM</sup>

COMMUNITY ARTS CENTER

## Donating Securities

**The Umbrella Community Arts Center, a qualified 501(c)(3) tax-exempt organization**, gratefully welcomes gifts of securities, and offers these guidelines to minimize delays and expenses. Your generosity makes an enormous difference!

### ELECTRONIC TRANSFERS

**DTC #:** 0075

**Brokerage Firm:** LPL Financial

**Account Name:** Emerson Umbrella, Inc.

**Account #:** 4183-3044

**Broker & Telephone:** John Lander: (978) 720-5278

**Reference:** Donor Name

**Tax ID #:** 04-2761964

**Please send notification of your donation via mail, fax, or e-mail to the address listed below.** Stock donations require additional communication from the donor that includes their identity, the name and quantity of securities, as well as what their gift is intended to support at The Umbrella. In accordance with IRS guidelines, the date of gift will be considered the date that The Umbrella assumes ownership of the shares. For crediting purposes, the value is determined as the average of the high and low listings on the date the stock is gifted.

**To donate mutual fund shares**, please contact the broker listed above to initiate the transfer.

If you need clarification or more information regarding the above instructions, please feel free to contact:

Katie Cimet, *Assistant Director of Development*

The Umbrella Community Arts Center

40 Stow Street, Concord, MA 01742

Telephone: (978) 371-0820 x201

Email: [katie@theumbrellaarts.org](mailto:katie@theumbrellaarts.org)