

# Giving Appreciated Securities to Cincinnati Museum Center at Union Terminal

## *Advantages to You*

MANY DONORS to Cincinnati Museum Center make gifts in the form of appreciated securities rather than cash. There is a good reason for this: *extra tax advantages*.

- You get the regular charitable income tax deduction if you itemize your taxes;
- You avoid paying tax on the capital gain;
- If you have owned the securities for more than one year, you may claim a tax deduction for the market value -- rather than purchase price -- of your securities.

## *How to Give Securities to Cincinnati Museum Center*

MAKING A GIFT of appreciated securities to Cincinnati Museum Center is a simple matter.

### When the stock is held by your broker or commercial banker:

1. Notify your broker or commercial banker that you are giving securities to Cincinnati Museum Center. Instruct them to hold the specified number of shares for the account and to advise Cincinnati Museum Center immediately by calling Jenny Yang (513-287-7019). Your broker or commercial banker will receive instructions as to the disposition of the securities.
2. Send a letter of instruction to your broker or commercial banker with a copy to Anthony Roderick's office indicating what stock you are giving, how many shares and for what purpose.  
NOTE: Stock gifts to Cincinnati Museum Center are valued at the mean price on the date of transfer. Absent a broker's letter documenting the transfer, stock will be valued as of the day it is received into our Fifth Third account.

### When the stock is in your name and in your possession:

1. Do not endorse the certificates. Mail or deliver unendorsed certificates by first class or registered mail to:

Jenny Yang  
Assistant Controller  
Cincinnati Museum Center at Union Terminal  
1301 Western Ave  
[JYang@cincymuseum.org](mailto:JYang@cincymuseum.org)  
(513) 287-7019

2. Mail a *stock/bond power* (use the form enclosed or obtain from a commercial banker) under separate cover to the same address. Sign the power exactly as your name appears on the certificate(s) and have the signature guaranteed by your broker or commercial banker, but do not fill in anything else.
3. Enclose a letter of transmittal with the certificate indicating your designation of the gift. Include a copy of the letter with the stock power.
4. If the certificates are already endorsed, send them by insured mail or deliver them by hand to the address above.

When the stock is in your name and in your possession, alternate method:

1. Deliver the unendorsed certificates to your broker or commercial banker. Sign a stock power for your broker or banker to guarantee.
2. Provide instructions to your broker or banker to hold the specific number of shares for the account of Cincinnati Museum Center and to advise Cincinnati Museum Center immediately by calling Jenny Yang at 513.287.7019. Your broker or commercial banker will be given prompt instructions as to the disposition of the securities. Please send a letter to Patricia Hassel's office confirming the gift and its designation.

### *Special Notes*

GIFT VALUE The gift value of the securities is the mean of their high and low prices on the date one of the following first occurs:

- The securities are transferred to an account in the name of Cincinnati Museum Center (absent a broker's letter documenting the date of transfer, the securities will be valued as of the day they are received in Cincinnati Museum Center's Fifth Third account); or
- The securities and stock powers are hand delivered or mailed (date of postmark) in negotiable form to Cincinnati Museum Center

*Thank you for your support of  
Cincinnati Museum Center at Union Terminal*