

## HOW TO MAKE A GIFT

### *Credit Card Donation by Telephone*

The Symphony is pleased to accept gift transactions using MasterCard, Visa, and American Express. You can make your donation by telephone by calling (619) 615-3908.

### *Check*

Make checks payable to: San Diego Symphony and send to the Symphony Development Office at 1245 Seventh Street, San Diego, CA 92101 or call today at (619) 615-3908.

### *Stock*

Many donors choose to give Annual Fund gifts to the Symphony through appreciated stock. Stock gifts may be easily transferred to the San Diego Symphony by wire transfer, by hand delivery or by mail.

Making a gift or appreciated stock is a wise choice. Consider gifts of qualified assets – stocks, bonds, or other appreciated long-term properties – that have been held for at least one year and one day in order to deduct their full current value. One of the advantages of giving stock is the avoidance of the capital gains tax on an appreciated asset. A person who sells an asset, such as stock, that has appreciated greatly in value since the person acquired it would realize a capital gain on the amount of the appreciation. In most cases, however, a person who donates an appreciated asset to charity instead of selling the asset can take a charitable deduction for the full value of the property and also avoid any realized capital gain.

The easiest way to donate stock is to electronically transfer shares into our account at Merrill Lynch, Pierce, Fenner and Smith Inc. (Merrill Lynch), San Diego. In addition to being convenient, market fluctuations are minimized by the speed of the transfer, allowing you to maximize your gift to the San Diego Symphony.

Call your banker or financial advisor and instruct your agent to electronically transfer shares to the San Diego Symphony's Merrill Lynch account. Deliver instructions are:

DTC Account:	5198
Agent:	Merrill Lynch Attn: Walton/Liddy Group 701 B Street, Suite 2400 San Diego, CA 92101
Credit to:	San Diego Symphony Account#291-04H00

Then call or write us of the donation and date of transfer, the Symphony will do the rest!

Stock gifts are valued based upon their delivery to the Symphony and donors of stock receive credit for the full value of the stock upon delivery.

If you have any questions, please call Eric Meyer, Director of Development, at (619) 615-3904.

*The San Diego Symphony is not engaged in rendering legal or tax advisory service. The purpose of this information is to provide accurate and authoritative information of a general nature. For advise and assistance in specific cases, the services of an attorney or professional advisor should be secured. Advice from legal counsel should be obtained when examining these types of charitable donations. Watch for tax revisions.*