



## Donating Gifts of Stock

### Contributing a Gift of Stock

A gift of appreciated stock might have a greater tax benefit than a gift of cash, because any appreciation during the term that the stock has been held is not subject to capital gains tax. (The PMA cannot give financial advice. If you have questions, it is important to consult your financial or taxadvisor.)

Stock gifts are valued on the day the stock is transferred to the PMA-the date it reaches our account at Charles Schwab & Company. The value of a stock gift is calculated by averaging the high and low quoted selling prices for the stock as of the gift valuation date.

On July 23, 2020 the Investment Committee unanimously approved an exception to the Gift Acceptance Policy to allow delaying the sale of securities until donor criteria are met provided the criteria are reasonable and realistic.

### Delivering Stock by Electronic Transfer

1. Please notify the PMA's Development Office that you will be making a gift.

*It is very important to us that we appropriately acknowledge the generosity of our donors in a timely and accurate manner. It can be difficult to identify the donor after a gift of securities is processed, particularly in the case of an electronic transfer. Therefore, please ask your broker to include your name and address in the OTC transfer instructions, and also please inform the PMA services of your gift by email, phone, or letter.*

2. Contact your financial advisor to arrange for the transfer securities to the PMA.
3. Please have your financial advisor use the following delivery instructions when making the transfer:

Broker: Charles Schwab & Co.

Account name: Portland Museum of Art

DTC#: 0164

Account number: 7592-6499

Donor name:

Donor address:

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### Questions?

For questions about this process, or for instructions on making a donation of any securities other than OTC-eligible stocks, please contact the OCIO Client Service Team at our investment consultant, Fund Evaluation Group. They can be reached by e-mail at [ocio@feg.com](mailto:ocio@feg.com) or by phone at 513-977-4400.