

# CAL SHAKES

CALIFORNIA SHAKESPEARE THEATER

Jonathan Moscone, ARTISTIC DIRECTOR

## Instructions for Transferring Securities Electronically

Thank you for inquiring about transferring securities electronically to California Shakespeare Theater. We appreciate you and your support.

### **Choosing Securities**

To ensure an efficient and beneficial experience, choose securities that meet these criteria:

- ✓ You have owned them for at least a year. If not, your charitable donation will be limited to what you paid for the securities, including fees.
- ✓ They are worth more than what you paid for them. If not, consider selling the securities and giving the Theater the proceeds. Doing this will allow you to claim a capital loss and a charitable income tax deduction if you itemize deductions on your income tax return.
- ✓ They are publicly traded (i.e. are listed on a major exchange). In many cases we can handle securities that are not listed on a major exchange, are subject to certain restrictions, or even are issued by a closely-held company, but these transactions take time and pose valuation issues.

### **Information for Your Broker**

Besides the following information about the Theater's account, your broker also may need written authorization from you before the transfer can take place. Check with him or her for specific requirements:

Acct. Title: California Shakespeare Theater  
Acct. #: 7306-3027  
DTC #: 0075  
Tax ID: 51-0169452

Broker: Jeff Deuel  
Linsco/Private Ledger (LPL)  
Address: Linsco/Private Ledger  
1500 Newell Avenue, Suite 315  
Walnut Creek, CA 94596  
Telephone: 925.952.3838  
Fax: 925.952.9938  
E-Mail: [jeff@deuelgroup.com](mailto:jeff@deuelgroup.com)  
[www.lpl.com/jeffrey.deuel](http://www.lpl.com/jeffrey.deuel)

Depending on your brokerage firm's internal procedures, transferring shares can take as little as one or two business days or as long as ten to fifteen. Keep this in mind near the end of the calendar year. For income tax purposes, your gift is complete only when the shares reach the Theater's account.

### **Please notify us**

Not all brokerage houses routinely convey the donor's name as part of the transfer process. To ensure prompt processing and acknowledgement of your gift, please notify the Theater when you have authorized a transfer of shares, including the name of your brokerage house and the name and the number of shares of each security to be transferred.

Contact Valerie Lines, Donor Relations Coordinator, if you have questions:

[vlines@calshakes.org](mailto:vlines@calshakes.org)  
510.548.3422 x 107  
510.843.9921 (fax)