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360.943.3012  
CapitolLandTrust.org

Connecting People, Conserving Land

You can make a gift of appreciated securities—publicly traded stocks, bonds and mutual fund shares—to Capitol Land Trust while avoiding capital gains tax. You will also receive the benefit of an immediate income tax deduction for the fair market value (average high and low prices on the day of the transfer).

Please note that the securities you use to make your gift must have been held by you for more than one year to be fully deductible, and always be sure to first consult with your financial advisor.

Instructions to share with your Financial Institution/Investment Advisor or Broker:

Account Name: Capitol Land Trust (Tax ID # 91-1413484)  
Account Number: 2881-4392  
DTC Number: 0164, Code 40  
Custodian: Charles Schwab & Co., Inc.  
PO Box 982600  
El Paso, TX 79998-2600

*All DTC deliveries must include above account name and account number*

So that we may promptly acknowledge your gift, please send incoming gift notifications by phone or email to:

Quita Terrell  
Finance & Operations Manager  
(360) 943-3012 x 5  
quita@capitollandtrust.org

Bob Heck with Kiley Juergens Wealth Management, LLC  
Investment Advisor for Capitol Land Trust  
(360) 350-4747  
bob@kj-wm.com

Feel free to contact either Quita Terrell or Bob Heck with any questions you may have.