CAPITOL LAND TRUST

CONNECTING PEOPLE, CONSERVING LAND.

Gifts of Stock, Bonds and Mutual Funds

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.

Capitol Land Trust's Tax ID/EIN # 91-1413484

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

Account Name/Registration: Capitol Land Trust
Account Number: 3337-5634
DTC Number: 0164
Code: 40
Receiving Institution: Charles Schwab

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

Alison Beglin, Development Director
360.819.1465
alison@capitollandtrust.org

Feel free to contact Alison with any questions you may have.
Capitol Land Trust's Financial Advisor is Bob Heck at Kiley Juergens Wealth Management, LLC. Please use the contact information below for questions, concerns or Assistance:

Bob Heck, Wealth Advisor
360.350.4747
bob@kj-wm.com

Ashley Slavin, Administrative Assistant
360.350.4747
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