

Donating Stocks, Bonds or Mutual Funds to An Achievable Dream

To donate appreciated stock to An Achievable Dream, please contact your broker to initiate the transfer. Your broker can electronically transfer shares using AAD's DTC number using the following information:

Brokerage: The Spencer Group at Morgan Stanley Smith Barney

701 Towne Center Drive, Suite 902

Newport News, VA 23606

Phone Number: (757) 873-3300

DTC Number: 0015-Morgan Stanley Smith Barney

Account Name: An Achievable Dream Middle & High School, Inc. (Tax ID# 54-1682144)

Account Number: 670-108027-062

Have your broker provide the following information directly to An Achievable Dream:

Donor's name and complete address

Name and number of securities transferred

Valuation of stock on date of transfer

Stock donations to An Achievable Dream Middle and High School from an individual, a business entity, Sole Proprietor (files Schedule C or F), Corporation, Sub S, Partnership, LLP, LLC, PLC, PC, are eligible to receive Virginia Neighborhood Assistance Program (NAP) tax credits. Donating appreciated assets, such as stocks, bonds, or mutual funds may provide a charitable deduction without the capital gains taxes that result from simply selling the asset. Talk to your tax accountant. Should you have questions about NAP tax credits or to make a donation of stock, please consult your tax accountant or call Alice Franklin in our office at (757) 599-9472.