



## Stock and IRA Rollover Gifts: Tax-Wise Ways to Donate GIFTS OF STOCK

### Instructions for transfer of securities via Depository Trust Company (DTC)

To contribute securities to WCA, please take the followings steps:

1. Notify WCA and their Broker, Davenport & Company, of the securities that you plan to donate.

**Please contact WCA:**

Rob Campbell  
Head of Administration  
101 School House Lane  
Williamsburg, VA 23188  
Tel. (757) 378-5265  
Fax (757) 345-5597  
Email: [campbellr@williamsburgchristian.org](mailto:campbellr@williamsburgchristian.org)

**Please Contact the WCA Broker:**

Davenport & Company LLC  
Attention: Mrs. Sherri L. Petefish  
5400 Discovery Park Blvd. Suite 301  
Williamsburg, VA 23188  
Tel. 757-258-2812  
Fax 1-866-932-6620  
Email: [spetefish@investdavenport.com](mailto:spetefish@investdavenport.com)

2. Instruct your broker to transfer the stock shares you have identified to Williamsburg Christian Academy as a charitable gift (Your broker may require instruction in writing – with a signature guarantee), providing them with the exact transfer instructions below:

Account Name: **Williamsburg Christian Academy**  
Reference **Account No. DA1047459**  
Pershing **DTC #0443**  
From: (Your name and account number)

**\*IMPORTANT – PLEASE instruct your broker to provide the following information directly to Williamsburg Christian Academy when transferring the stock to WCA via DTC:**

- **Your name and complete address; Your account number;**
- **Name and number of securities transferred; Valuation of stock on date of transfer;**
- **WCA Fund Designation**

**Without this information, we cannot identify and acknowledge the gift.**

**Please note, Mutual Fund gifts require additional arrangements. If you wish to transfer mutual funds, please call the WCA broker at the contact information above.**

**Thank you for your contribution to the Williamsburg Christian Academy Ministry. WCA is a 501 (c) (3) not for profit corporation.**