

Outright Gift of Appreciated Securities

Securities and mutual funds that have increased in value and been held for more than one year are one of the most economical ways to make a gift to the Museum of the American Revolution. You can reduce or even eliminate federal capital gains taxes on the transfer. You will be able to take a federal income tax charitable deduction equal to the fair market value of the stock on the date of the gift for up to 30% of your adjusted gross income and will not have to recognize the appreciation as capital gain.

Securities held by your bank or broker

Please notify your bank or broker that you are making a gift of securities to the Museum and share the following instructions. Also call the Museum at 215-579-3531 to alert us that the gift is on its way and to indicate how you would like the gift to be used.

Donated Securities:

Bank: Haverford Trust
Haverford Trust DTC Number: 0901
Haverford Trust house account number: 302466
Account Name: The Museum of the American Revolution
Account Number: 004240
EIN: 2773714
Haverford Trust Contact: Diane DiPrinzio
Phone: 610-995-8782
Fax: 610-995-8793

Securities held by you

Please send unendorsed certificates by mail, along with a letter giving your name, address, and the purpose of your gift to:

Museum of the American Revolution
101 South Third Street,
Philadelphia, PA 19106
Attn: Ilana Goldfus

In a separate envelope, please mail to the same address a stock power for each certificate, along with a copy of your letter. Do not complete any information on the stock power other than your signature and the date and obtain a medallion signature guarantee.

Your bank or broker can supply you with blank stock powers. For most expedient handling, do not fill in the Museum's name as transferee on either the stock certificate or the stock power, and please do not send stock certificates to a transfer agent for transfer into the Museum's name.

Thank you for helping keep the spirit of the American Revolution alive for future generations!