



## Making Gifts of Appreciated Securities

One of the most cost-effective ways to support Opera Philadelphia is with shares of stock that have increased in value since their purchase or acquisition. Generally, you may be entitled to claim a charitable tax deduction for the current market value of the stock, and may pay no capital gains tax on any appreciation.

***If you are in possession of the actual stock certificates that you wish to donate*** – please forward the unendorsed certificate(s) to Opera Philadelphia with a letter stating that you are making a gift to the company. In a separate envelope, forward a signed stock power transfer form and a copy of your donation letter.

***If the securities to be contributed are held by your broker*** - the easiest way to transfer these shares is by direct transfer from your broker to the Opera's broker.

- Please have your broker:
  - Send the designated securities to: DTC (“Depository Trust Co.”)
  - DTC code: 0226
  - Care of: Fidelity Investments
  - Account #: Z50335932
  - Account name: Opera Philadelphia
  - Include your name in the memo

To ensure proper handling, please notify Opera Philadelphia prior to authorizing the transfer of stock certificates. Should you have any questions, please contact Jennifer Dubin, Associate Director, Individual Giving and Patron Services, at 215.893.5908 or [dubin@operaphila.org](mailto:dubin@operaphila.org).

The Opera Company's federal tax ID # is 23-1504706.

***Opera Philadelphia cannot provide tax or legal advice and nothing herein may be construed as such. Please consult with your own tax advisor or legal counsel concerning such matters before taking any action or making any decisions.***