



WILLIAMSBURG LANDING

How to Make a Gift of Securities to Williamsburg Landing

Stock gifts of appreciated stock can yield tax benefits because they are deductible from your income tax at their fair market value. This kind of gift avoids capital gains tax that would otherwise result from selling the stock and then using the cash to make your gift to Williamsburg Landing. Gifts of appreciated assets are typically deductible in amounts up to 30% of adjusted gross income, and any excess deductions may be carried over for use in the future.

For most people, an electronic transfer (or DTC transfer) of the shares between your broker and Williamsburg Landing's broker is the easiest method. Stock transferred in this fashion is valued on the date of the transfer — the date it moves into the Williamsburg Landing account.

We recommend that you send a brief letter to your broker, with a copy to us, indicating that a gift is being made to Williamsburg Landing and the purpose for which it is intended.

Our broker's contact name and number is:

Felicia Stovall
Chesapeake Investment Group
Phone: (757) 253-9088
Account number: A4G019301
DTC number 0443

For additional information, please contact:

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WLI recommends that donors considering a gift seek legal, investment and/or tax counsel before making a gift.