

PRESERVATION  
ESTD SOCIETY 1920  
of CHARLESTON

The Preservation Society of Charleston welcomes gifts of stock. With a stock gift, the donor enjoys a tax deduction for the full value of the stock based on the average of the high and low prices for which the stock is selling on the day it is gifted to the Society.

To give stock to the Preservation Society, please provide your brokerage firm with the following information needed to process the stock gift -

Charles Schwab & Co., Inc.

DTC Clearing 0164, Code 40

For Credit to: Preservation Society of Charleston

Account No. 4636-6459

Preservation Society of Charleston Tax ID: 57-0439524

If your broker needs assistance processing the direct stock transfer, please refer them to Charlotte Glover, Client Services Manager at our brokerage firm, Southeast Asset Advisors (SAA), 843.823.6699, [cglover@assetadvisors.com](mailto:cglover@assetadvisors.com). The Preservation Society's Tax ID is 57-0439524.

We also ask that you ***please notify our Advancement Office of your gift*** to ensure we receipt your gift properly and designate the fund according to your preferences. You can also contact a member of our Advancement Office staff (contact information provided below) if you have any questions or need additional information about gifting stock.

Courtney Theis, Director of Advancement, 843.722.4630 x117  
[ctheis@preservationsociety.org](mailto:ctheis@preservationsociety.org)

Rebecca Hoffman, Manager of Advancement & Planned Giving 843.722.4630 x113  
[rhoffman@preservationsociety.org](mailto:rhoffman@preservationsociety.org)

Thank you on behalf of the Preservation Society of Charleston for considering a stock donation. Your support is vital to the Society's success in standing up to preserve Charleston's character, quality of life, and diverse neighborhoods.