



2018/2019 Season

Instructions for Transferring Gifts of Stock or Securities

Thank you for generously supporting La Jolla Playhouse through your gift of appreciated stock or securities. We work closely with Charles Hartford's team at Merrill Lynch Wealth Management in La Jolla to process these gifts.

When you or your wealth management team is ready to make your gift, kindly alert us **informing us of the day that you are sending your stock, along with the type and # of shares that we are to receive from your broker or wealth management team.** *Knowing this information in advance will keep La Jolla Playhouse organized and quick to process your gift and acknowledge your generosity.*

Here are the instructions:

DTC Number: 8862
Account 231-02100
Account title: Theatre and Arts Foundation of San Diego County, dba La Jolla Playhouse
Merrill Lynch
7825 Fay Avenue, Suite 300
La Jolla, CA 92037

Charles Hartford and team may be reached at:

Charles W. Hartford
Financial Advisor
Portfolio Manager, PIA Program
San Diego Complex Sales Manager

The Hartford Group, Merrill Lynch
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Main: (800) 866-0231

Fax: (858) 201-4440

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It is our policy to give you an acknowledgment for the average of your stock on the day that you transfer it to Merrill Lynch – this is your gift date. It is also our policy and practice to immediately sell shares received. (We will let you know the value in your acknowledgment letter.)

If you have any questions, please contact Bonnie Broberg, Associate Director of Philanthropy, at bbroberg@ljp.org or (858) 228-3084.



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HELP US TRANSFORM LIVES THROUGH THEATRE: MAKE A 2018 TAX-FREE IRA GIFT TO LA JOLLA PLAYHOUSE

As a non-profit theatre, La Jolla Playhouse depends upon the generosity of charitable giving to bring amazing stories to life on stage, and to make an impact for ALL in our community – including underserved students and military families.

If you're age 70 ½ or older, you can make direct transfers of up to \$100,000 per year from your individual retirement accounts to La Jolla Playhouse without having to count the transfers as income for federal tax purposes. Since no tax is incurred on the withdrawal, gifts do not qualify for a charitable deduction, but may be counted toward an individual's minimum required distribution. Your gift can be even be designated to support programs or performances of your choice!

To partner with us and to request your Charitable IRA Rollover Gift Instructions form, please contact Bonnie Broberg, Associate Director of Philanthropy, at bbroberg@ljp.org or (858) 228-3084.