



FREQUENTLY ASKED QUESTIONS CONTRIBUTED STOCK

1. May I make my contribution to the Cultural with stock instead of cash?

Yes, the Oregon Cultural Trust has an account within the Oregon State Treasury at the State Street Bank & Trust. Please call Shannon Planchon at 503-229-6062 or e-mail shannon.planchon@state.or.us for assistance in setting up the transfer.

2. May I make a contribution from my mutual fund account? No, we are unable to accept gifts of mutual fund shares.

3. How do I make a stock transfer to the Cultural Trust?

In order for the Cultural Trust to accept the stock, **we must authorize our banker** to accept the transaction. Either you or your broker must contact the Oregon Cultural Trust or the transaction will be declined. Contact shannon.planchon@state.or.us and provide the following information:

A) Donor Name, Phone Number, and if a new donor, your mailing address so we may send you a receipt.

Stock Contribution:

DTC Participant # for the Stockbroker, broker's name, and phone number

Name/Trading Symbol of Shares

Number of Shares

Anticipated date of transfer

B) This is the information your stockbroker will need to make the transfer:

The Oregon State Treasury, at State Street Bank & Trust Co. (DTC #0997), account number 597X (for the Oregon Cultural Trust).

4. How will the value of my contributed stock be determined?

Once the gift has been transferred to our account, our bank will sell the shares and report the amount of the proceeds to the Cultural Trust. We will send you a letter acknowledging the gift, and include the name of the stock shares, the number of shares received and the average price of the stock on the day it was received in our account. We recommend that you confirm the number with your tax advisor.

You may claim an Oregon tax credit for the amount you contributed to the Oregon Cultural Trust Fund (up to \$500 for individuals, \$1,000 for couples, or up to \$2,500 for corporations) provided that you made equal or greater contributions to one or more qualified cultural organizations in Oregon in the same tax year.