



Donating Stock to Springmont

Gifts of stock benefit the annual Springmont Fund Campaign that funds campus and classroom enhancements and offers tax benefits to the donor.

Contributions of appreciated stock held for more than a year are:

1. Tax-deductible at market value;
2. Exempt from capital gains tax on increased value; and
3. Eligible for up to a 30% deduction on your adjusted gross income with a five year carry forward.

Please notify the Development Office at development@springmont.com or call 404-252-3910 if you need additional details or plan to make a transfer.

Instructions for Transfer

The simplest way to handle a stock gift is to transfer the shares electronically through your brokerage account into the Springmont account at Truist Investment Services, Inc.

Please send a Letter of Instruction (signature guarantee stamp required), example below:

Please send _____ shares of _____ security via DTC to the Springmont account at Truist Investment Services, Inc. as follows:

DTC number: 0226

Account number: WA8070427

FBO: Springmont School, Inc.

Feel free to call Truist at 404-442-5078 or email Jeanetta Johnson in the Springmont Business Office at jjohnson@springmont.com with any questions.