

Stock Gifts

If you own a stock that has grown in value with time, you may have to pay capital gains taxes on the difference between the purchase price and selling price when you decide to sell the stock. Donating the stock directly to Stevenson University gives you a tax deduction based on the fair market value of the security (an average of the high and low price of the stock the day it is donated) and saves you the capital gains tax you would have incurred by selling the stock.

There are two ways to make a gift of appreciated stock directly to Stevenson University. (You must have owned the stock for one year to donate it.):

1. A DTC Automated Stock Transfer.

- a. Instruct your broker to contact Katharine Dudley at Jemma Financial. Her phone number is 443-279-2007.
- b. Give your broker the following information:
 - The bank name: First Clearing
 - The account name: Stevenson University Gifting
 - The University's account number: 8586-1767
 - The DTC number: 0141
- c. Instruct your broker to contact Rachel Yerks in the University's Advancement Office on 443-334-2238 to alert Stevenson of the gift's transfer.
- d. Have your broker advise SU where the gift is to be assigned, or call the University Advancement Office on 443-334-2238 to advise where the gift should be designated.

2. Mailing a transfer

- Send the UNSIGNED stock certificate by registered mail to:
Office of University Advancement
Stevenson University
1525 Greenspring Valley Road
Stevenson, MD 21153-0641
- Include an instructional note with the certificate indicating the owner/donor of the shares and how the gift is to be applied.
- In a SEPARATE envelope, please send a signed stock power form with a copy of your note of instruction. The certificate remains non-negotiable until it is joined with the stock power at the University. The date for establishing the gift value of the stock is the postmarked date on the envelope when it passes from your control.
- Instruct your broker to contact Rachel Yerks in the University's Advancement Office on 443-334-2238 to alert Stevenson University of the gift.

3. ACH and ETF Instructions

- Fulton Bank
- ABA/Routing # 031301422
- Account number is 93460641
- SWIFT code is FLBKUS33