

MAKING A GIFT OF SECURITIES

THANK YOU FOR CONSIDERING A GIFT OF SECURITIES TO THE UNIVERSITY OF WASHINGTON

Donating appreciated securities is an excellent way to show your support for the UW; It may also provide you with significant tax benefits. Please consult with your tax advisors for specific tax advice when giving securities. The information below will help guide you in making your gift.

DONATING SECURITIES THROUGH ELECTRONIC TRANSFER

FOR SECURITIES HELD IN BROKERAGE OR BANK ACCOUNTS

- 1) Instruct your broker to transfer **a specific number of shares in a particular company**. You may contribute stock from several companies.
- 2) Provide your broker the following delivery instructions*:

| | |
|-----------------|--|
| Account Name: | University of Washington |
| Account No: | # 144-153275-535 |
| Brokerage Firm: | Morgan Stanley Wealth Management 601 Union Street, Suite 5100 Seattle, WA 98101 |
| DTC: | #0015 |
| Comments: | (Donor Name) |
| UW Contact: | Alana Askew (206) 685-3814 |

- 3) **Contact the UW**. Email a gift letter or broker directive to stockgif@uw.edu to prevent a delay in processing.
 - Let us know the **name of the security, number of shares and benefiting department(s) and/or the specific gift fund(s)**.
- 4) For University records, the gift value is the mean of the high and low price of the stock on the gift date.
- 5) The University will send a tax receipt at a future date.
- 6) If you are making a gift with your year-end taxes in mind, securities gifts are best made by **December 15**.

DONATING SECURITIES IN CERTIFICATE FORM OR MUTUAL FUNDS

If you have stock or bond certificates, or would like to donate mutual funds, please contact the UW Treasury Office at (206) 685-3814.

*Contact us if you need other delivery options.

UNIVERSITY CONTACT

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