



## Giving Appreciated Stock

Thank you for your interest in making a gift of appreciated stock to support Virginia Wesleyan University. Giving securities is an easy and tax-wise way to show your support of Virginia Wesleyan University. As the owner of stocks or bonds that have appreciated in value, selling these assets incurs capital gains taxes. Donating these securities is a cost effective way to make a charitable gift.

### Benefits of Giving Appreciated Stock:

- A charitable tax deduction equal to the full fair market value of the securities at the time of your gift
- Avoidance of the capital gains tax on the increased value
- Reduction of the cost of making a gift, when a long or mid-term appreciated stock gift is made
- Donating securities is easy

### Making Your Gift with Appreciated Stock by Electronic Transfer:

Giving stock through electronic transfer is the easiest method to make your gift when you maintain holdings in a brokered account. You may transfer your stock electronically to the Virginia Wesleyan University clearing broker.

- Provide the following information to your transferring broker:
  - ✓ Account Name: **Virginia Wesleyan University**
  - ✓ Account Number: **WV10322**
  - ✓ Depository Trust Company (DTC): **0221**
  - ✓ Clearing Broker: **UBS Financial Services Inc., Attn: Rodney Duckworth**  
440 Monticello Avenue  
Norfolk, VA 23510  
(office) 757.624.2173 (fax) 855.234.0834
- *Alert **Kim Hammer** in the Center for Advancement with Virginia Wesleyan University at **757.455.3205** or **khammer@vwu.edu** before the transfer* so the University can make arrangements with its broker to receive the stock. The University cannot retain an unidentified security.
  - ✓ Donor's name
  - ✓ Name of stock and number of shares
  - ✓ Date of intended transfer
  - ✓ Indicate the purpose of the contribution, if applicable
- Lastly, ask your transferring broker to contact Rodney Duckworth with UBS Financial Services, Inc. once the transfer is made in order to confirm.

**THANK YOU!**