

HOW TO GIVE SECURITIES TO WRIGHT STATE UNIVERSITY

Gifts of **appreciated stock** and **marketable securities** enable you to maximize your philanthropic giving while offering financial benefits:

- *A federal income tax deduction equal to the fair market value of the securities on the date of your gift, provided you have owned the securities for more than one year*
- Avoidance of capital gains tax on the transfer

To support Wright State University with a gift of securities, follow the instructions below:

Securities Held By You:

Deliver or send (via regular first-class mail) the unendorsed certificates with a letter of transmittal giving your name, address, and purpose of the gift to:

Wright State University Foundation, Inc.
Attn: Robert T. Batson, CFO
Foundation Building, Room 375
3640 Colonel Glenn Highway
Dayton, OH 45435-0001

Under separate cover, deliver or send to the same address a signed stock power executed in blank for each security, along with a copy of your letter of transmittal. Blank stock power forms may be obtained from your bank, your broker, or by contacting the WSU Office of Development.

(Please Note: For expedient and secure handling, do not write WSU's name as transferee on the stock certificate.)

Securities Held by Your Bank or Broker

The WSU Foundation requests that donors who wish to give securities held at a bank or brokerage firm have the securities transferred electronically to the WSU Foundation. First, notify Tracey McKellar at the WSU Foundation (937-775-2766 or 1-800-535-0688) of the planned gift of securities. Give your name, address, name of security, number of shares to be given, date of the planned transfer, purpose/designation of your gift, and name and phone number of your bank or broker.

Then, instruct your bank or broker to do a DTC free delivery transfer to the Foundation's account at Merrill Lynch: **DTC 5198 for the account of 666 04219 in the name of Wright State University Foundation, Inc.**

Valuation

The effective date of your charitable gift is the date the securities pass unconditionally from your control. For example, if you mail stock certificates to the WSU Foundation, the gift is effective on the date of mailing (i.e. postmark). If you transfer stock to the WSU Foundation through electronic transfer, the gift is effective on the date the shares are actually transferred to the Foundation's account. For listed securities, the gift value is based on the mean of the market – the average of the high and low quotations – on the official gift date.

Wright State University Foundation, Inc. Federal Tax ID number: 23-7019799

Office of Development
Wright State University
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435-0001
(800) 535-0688, (937) 775-2251
Fax (937) 775-2736

Donors should consult with their attorneys and/or accountants before making substantial charitable gift.