



## SOUTHWESTERN UNIVERSITY

### GIFTS OF SECURITIES

Giving stocks and bonds that have increased in value (and that you have owned for more than one year) provides even greater tax benefits than giving cash.

Not only is the market value of the securities deductible (subject to applicable limitations), but you also avoid paying the capital gains tax on the appreciation.

The value of a securities gift is the median of the high and low market price of the stock or bond on the date of your gift. You are entitled to deduct the gift value of securities for up to 30 percent of your adjusted gross income. (The maximum allowable deduction for all charitable contributions in any given year is limited to 50 percent of an individual's adjusted gross income.) Any excess can be carried over for an additional five years.

If your stock is held in custody with a brokerage firm or bank trust department, you can make a direct transfer of the securities from the custodian firm or bank to Southwestern's account at Regions Bank, Little Rock, AR (SEI Private Trust Company). You should instruct the holding institution to make a direct transfer, known as a "DTC", with the following instructions:

Please deliver [*insert #*] shares of [*insert stock name and symbol*] from my account with [*insert brokerage firm name*], account number [*insert account number*] to:

DTCC #: 2663  
Account Name: Southwestern University  
Account #: 7050000767

ATTENTION: Jeff Davis, Relationship Consultant,  
jeffrey.davis@regions.com, 205-766-5759

Please notify Southwestern University's Development Office at 512-863-1211 of the transfer of stock, name of stock, and number of shares transferred and indicate how your gift is to be used (scholarships, Southwestern Fund, etc.). This will enable the university to acknowledge your gift promptly and respect any restrictions or preferences you may have for the use of the gift.

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