



THE CAMPUS SCHOOL
of Carlow University

Security Delivery Instructions

The Campus School at Carlow University welcomes the gift of stock and other securities. The Campus School benefits by selling the stock without paying taxes on the gain, and you benefit from making a contribution that would be larger than what you might have been able to donate in cash.

A gift of stock or other appreciated property entitles you to a tax deduction for the market value of the donated stock. If the stock you wish to donate has been held for more than one year, you can avoid capital gains tax on any appreciation of the stock by donating the stock prior to sale.

When making a gift of long-term appreciated stock and securities, be sure to transfer ownership of the securities to The Campus School at Carlow University. Do not sell the stock or securities on your own; this protects you from the capital gains tax on any appreciation.

Please note: Information found on this page is intended to provide general information and is not intended as legal advice nor should be relied upon as such.

Donating appreciated securities, including stocks or bonds, is an easy and tax-effective way for you to make a gift to The Campus School at Carlow University.

Benefits of Gifts of Stocks and Bonds

- Avoid paying capital gains tax on the sale of appreciated stock
- Receive a charitable income tax deduction
- Further our mission today

How to Make a Gift of Stocks and Bonds

BY ELECTRONIC TRANSFER - Below are instructions for how to transfer stock or bonds from your brokerage or investment account to The Campus School at Carlow University.

Janney Montgomery & Scott LLC D.T.C. Clearing # 0374

Carlow Account # 19783756

Broker: Cindy Pastin; Direct Phone (412) 562-7935

Assistant: Kimberly Krapp; Direct Phone (412) 562-8074 1-800-441-1514; Fax (412) 562-7973

The Campus School at Carlow University Federal Tax ID# 25-0965438

Please contact Tiffany Jimenez, Campus School Director of Development, at 412-578-6260 or via email at tmjimenez@carlow.edu to notify us of the pending stock transfer so that we can properly credit your gift.

BY CERTIFIED MAIL - If you hold securities in certificate form, you will need to mail two envelopes separately to complete your gift. In the first envelope, place the unsigned stock certificate(s). In the other envelope, include a signed stock power for each certificate. You may obtain this power from your broker or bank. Please remember to use certified mail.

More on gifts of stocks and bonds

There are special rules for valuing a gift of stock. The value of a charitable gift of stock is determined by taking the mean between the high and low stock price on the date of the gift. Mutual fund shares are valued using the closing price for the fund on the date of the gift.