

## Make a Gift of Securities to Support SCSU

### Why Consider a Gift of Securities to SCSU?

If your investments have appreciated overtime, you may be able to give much more than you thought possible by transferring appreciated securities (stocks, bonds, and mutual fund shares) rather than cash. You could possibly avoid the potential capital gains tax on the appreciation, provided you have owned the investment for more than one year. SCSU benefits from the full amount of your gift.

### How to Make a Gift of Securities to the SCSU Foundation

To ensure the transaction is properly executed and credited, please complete the form below. Return it to us and please inform your broker to contact SCSU gift processing (contact information listed below) directly, prior to making a transfer to SCSU's Fidelity account. Our Fidelity account is as follows:

D.T.C. #0226 for Fidelity Account #Z40-212884

The form must be completed and returned to us each time you make a gift of securities. If you hold the securities in certificate form or have any questions, please contact the SCSU Foundation to ensure the most efficient transfer possible.

Thank you for your gift of securities supporting SCSU. We will send you a letter acknowledging the securities transferred and will credit the gift to you at the average market value on the date of transfer. Please allow additional time for the processing of this type of gift.

### Questions? Contact the SCSU Foundation:

Sue Quagliaroli, Gift Processing Manager, 203.392.7083, [quagliarols1@southernct.edu](mailto:quagliarols1@southernct.edu)

Krista Hayes, Business Manager, 203.392.5916, [hayesk11@southernct.edu](mailto:hayesk11@southernct.edu)

Return the form below to: SCSU Foundation, Inc. via email to: [quagliarols1@southernct.edu](mailto:quagliarols1@southernct.edu)



### SECURITIES TRANSFER FORM

My broker/brokerage firm is: \_\_\_\_\_

I intend to transfer \_\_\_\_\_ shares of \_\_\_\_\_ on \_\_\_\_\_

CUSIP or Ticker \_\_\_\_\_

Estimated value of my gift: \$ \_\_\_\_\_

My gift is to be used to support: \_\_\_\_\_

NAME (please print) \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/STATE/ZIP: \_\_\_\_\_

DAYTIME TELEPHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_