

# HOW TO DONATE SECURITIES TO WRIGHT STATE UNIVERSITY

You may donate securities directly to the foundation, including publicly traded stocks and bonds and nonpublic securities, which may provide important tax advantages if you have held those securities for more than one year.

You may give securities outright or transfer them to create a planned gift. As the method of transferring securities depends on how they are held, please consult the Wright State development staff for guidelines.

## Securities Held By Your Bank Or Broker

To give securities held at a bank or brokerage firm, ask the firm to transfer the securities electronically to the foundation.

### Step 1. Notify the Wright State University Foundation.

Call Brianna Beedy at the foundation ((937) 775-2766, 1-800-535-0688, or (937) 775-2251) to let us know of the impending gift of securities.

- Please provide your name, address, name of security, number of shares to be given, date of the planned transfer, purpose or designation of your gift, and name and phone number of your bank or broker.

### Step 2. Provide electronic transfer instructions to your bank or broker.

Instruct your bank or broker to do a DTC free delivery transfer to the foundation's account at **Merrill Lynch: DTC 8862 for the account of 666 04219** in the name of Wright State University Foundation, Inc.

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

## Securities Held By You

**Step 1.** Deliver or send via regular first-class mail the unendorsed certificates with a letter of transmittal with your name, address, and purpose of the gift to:

Wright State University Foundation, Inc.  
Attn: Robert T. Batson, Assistant Treasurer  
3640 Colonel Glenn Highway  
Dayton, OH 45435-0001

*Please note:* For expedient handling, do not write Wright State's name as transferee on the stock certificate.

**Step 2.** Under separate cover, deliver or send to the address above 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 downloaded here.

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

## Valuation Date

For valuation purposes, the effective date of your charitable gift is the date the securities pass unconditionally from your control.

- If you mail stock certificates to the foundation, the gift is effective on the date of mailing (e.g., postmark).
- If you transfer stock 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.