



## TRANSFERRING STOCK TO SEATTLE UNIVERSITY

Making a stock gift is an easy and tax-wise way to invest in Seattle University. A gift of appreciated securities saves taxes twice. You may receive an income tax deduction for the full market value of the donated shares if you've held the securities for more than one year, and you may avoid capital gains tax on the appreciation.

If you have your shares of stock in the brokerage account, you will need to provide your broker with the following information:

<b>Brokerage House:</b>	<b>Merrill Lynch</b>
<b>Broker Name:</b>	<b>Stephen Hollomon/Jens Pascucci</b>
<b>For the account of Seattle University</b>	<b>335-04033</b>
<b>The DTC Number is</b>	<b>8862</b>
<b>Seattle University's Tax ID is</b>	<b>91-0565006</b>

1215 Fourth Ave, Suite 2600  
Seattle, WA 98161  
Phone: (206) 464-2822  
Email: [stephen\\_hollomon@ml.com](mailto:stephen_hollomon@ml.com)  
[jens.pascucci@ml.com](mailto:jens.pascucci@ml.com)

If you have the stock certificate(s) **in your possession** or would like to gift restricted stock or a mutual fund, please contact Advancement Services:

Martine Ryan  
Advancement Services  
Seattle University  
901 12<sup>th</sup> Avenue, ADMN 305B  
Seattle, WA 98122-1090  
Phone: 206.220.8466  
Email: [gifts@seattleu.edu](mailto:gifts@seattleu.edu)



## Stock Gift Transmittal Form

It is critical when making a gift of stock that you alert Seattle University in advance, so that the gift will be properly credited when received, and so that we may provide an accurate gift receipt.

This form is to help you in facilitating your stock gift to Seattle University. We will need the following information in order to process the stock gift. When you have completed this form, you may print and mail it to Advancement Services (address above), or send this information in an email to [gifts@seattleu.edu](mailto:gifts@seattleu.edu). For more information call Martine Ryan at (206) 220-8466.

Date \_\_\_\_\_

Donor Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Name of stock being transferred: \_\_\_\_\_

Stock symbol: \_\_\_\_\_ Number of shares \_\_\_\_\_

Unrestricted (Seattle University Fund)

Restricted (School, College, Program, Endowment Fund):

\_\_\_\_\_  
(please specify purpose)

Stock brokerage firm: \_\_\_\_\_

Stock broker's name/phone number: \_\_\_\_\_

Stock to be transferred to SU through your broker to:

Seattle University's brokerage account at Merrill Lynch with Stephen Hollomon/Jens Pascucci  
DTC #8862      ACCOUNT #335-04033