

YOUNGSTOWN STATE UNIVERSITY

FOUNDATION

MAKING A GIFT OF STOCKS, BONDS, OR MUTUAL FUNDS TO THE YOUNGSTOWN STATE UNIVERSITY FOUNDATION

Funding philanthropic gifts through the transfer of stocks, bonds, or mutual funds has become a preferred giving method for charitable donations. By means of gifting securities, the donor realizes a tax deduction of the full market value on day of receipt of security and avoids capital gains and income taxes.

Prior to transferring securities, please inform the YSU Foundation by telephone or e-mail of:

- Name of security
- Type of security (common stock, preferred stock, mutual fund, bond)
- Number of shares, or units, to be gifted
- Approximate date of gift
- Broker name, telephone number and broker DTC number where transfer is originated

Call your broker or trust officer, and ask them to make an electronic transfer (DTC) of shares from your portfolio to the Youngstown State University Foundation as follows:

DTC delivery instructions:

Morgan Stanley

Participant (DTC) #0015

Account: 949-025918

Account Name: Youngstown State University Foundation

Attn: Mary Deasey: 614-473-2425, Mary.E.Deasey@msgraystone.com

Physical certificates: Please give to your YSU Foundation Development Officer, who will follow the gift transfer process.

As soon as your gift has been completed, the Youngstown State University Foundation will send you an acknowledgment letter and tax receipt for your gift. Additional contributions can be made to increase the value of the endowment while increasing the scholarship award.

All gifts are tax-deductible as provided by law.

For further information, contact the YSU Foundation

Federal Tax ID # 34-6576610