

Taking Stock in Gannon University

The stock market has reached new, unprecedented heights. If you are looking to maximize the power of your charitable contributions, consider donating your long-term appreciated securities to Gannon University.

Benefits of gifting appreciated securities to Gannon University

Donating long-term appreciated securities directly to Gannon University, rather than selling the assets and donating the cash proceeds, is one of the best and easiest ways to give more!

A charitable contribution of long-term appreciated securities, i.e. stocks, bonds and/or mutual funds that have realized significant appreciation over time, is one of the most tax-efficient of all ways to give. This method of giving has become increasingly popular in recent years because of **two key advantages:**

- Any long-term appreciated securities with unrealized gains (meaning they were purchased over a year ago, and have a current value greater than their original cost) may be donated to a public charity and a tax deduction taken for the *full fair market value of the securities*; up to 30% of the donor's adjusted gross income.
- Since the securities are donated rather than sold, *capital gains taxes from selling the securities no longer apply*. The more appreciation the securities have, the greater your tax savings will be.

How to make a gift of appreciated securities to Gannon University

- Contact your financial advisor for guidance.
- Notify Gannon's University Advancement Office (814-871-7468) of your wishes to contribute appreciated securities and work with them on the designation of your gift. For example: an endowed scholarship, faculty professional development, faculty lead student research, speaker series, study-abroad, mission trips, academic departments, athletics, Nash Library, or capital project.
- Complete the gift intention form below with your financial advisor and give or send it to your broker.
- Notify Jana Hunt, Associate Director, Gift Recording, about the transfer at 814-871-7469, hunt001@gannon.edu or Gannon University, 109 University Square MS03, Erie, PA 16541. (The Gannon tax identification # is 25-0496976).

Questions or assistance contact

University Advancement Office, Attention: Tammy Knox, Assistant to the Vice President, Gannon University, 109 University Square, Erie, PA 16541; 814-871-7468; knox013@gannon.edu



**GANNON UNIVERSITY
GIFT OF SECURITIES TRANSFER FORM**

DATE _____

BROKER NAME _____

BROKER ADDRESS _____

I wish to make a donation of appreciated securities to Gannon University.

Please consider this your authorization to transfer _____ shares of

_____ common preferred stock/mutual fund which are held in my

Account # _____ to be designated to _____.

Please transfer these shares to:

RBC Wealth Management
DTC # 0235
For further credit to Gannon University
Account # 304 - 13370
TIN# 25-0496976

I hereby relinquish all ownership of said shares.

Thank you for your prompt attention to this request.

Sincerely

Signature

Date

Name _____

Address _____

City, State, Zip _____

Phone # _____

E-mail address _____