

Gifts of Stock and Mutual Funds

Gift Planning
at Washington State University

Gifts of marketable stocks or mutual fund shares that have appreciated can have an immediate impact on a college or program at WSU while creating a favorable income tax deduction for you based on the assets' current value. Mutual fund gifts are recolonized as the value of the closing price and stock gifts recognized at the average of the high and low on the date of transfer. Please contact the WSU Foundation at 509-335-1686 if you have any questions about making a gift of stock or mutual funds to support Washington State University.

509-335-7883 or 800-448-2978

gpoffice@wsu.edu

foundation.wsu.edu/giftplanning

SHARES IN "STREET NAME"

If you hold stock in a "street name" with an existing brokerage firm and do not have a preference for a particular broker, the shares should be transferred to a brokerage firm where the WSU Foundation maintains an account.

PREFERRED BROKER

The WSU Foundation's preferred broker is Raymond James Securities.

Raymond James Securities	Account Number: 46361951
Attn: Jack Simpson	Tax ID Number: 91-1075542
759 N Milwaukee St, Suite 612	DTC Number: 0725
Milwaukee, WI 53202	
Phone: 888-721-6117 or 414-935-4190	
Fax: 414-935-4195	

The WSU Foundation also has accounts with the following brokers. If you hold an account with one of these firms, you may provide this account information.

Brokerage Firm	Account #	Account Executive	Phone #
Edward D. Jones	870-03981-1-1	Greg Bloom	509-332-1564
Charles Schwab	9215-7296	N/A	800-435-9050
Morgan Stanley	111-109037	Marnie Schroer	509-455-5047
Merrill Lynch	340-04202	Adam Little	509-459-4552
DA Davidson	63816334	Rusty Schatz	800-808-5396
Fidelity Investments	144-341673	N/A	800-544-6666

Information is subject to change. Please notify the WSU Foundation if you encounter any problems.

Contact the WSU Foundation at 509-335-1686 to alert us of the gift and confirm the gift use instructions.

For information on cash and wiring instructions, please contact the WSU Foundation's Gift Accounting Office at 509-335-1686 or wsuf.gift.accounting@wsu.edu.



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