

# Gifts of Stock

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. 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  
gproffice@wsu.edu  
foundation.wsu.edu/giftplanning

## MAKING A GIFT OF STOCK OR MUTUAL FUNDS

The following information applies to outright gifts only. Gifts of stock for the establishment of a deferred gift are subject to approval by the Gift Acceptance/Trust and Real Estate Management Committee.

Stock gifts are recognized at the realized value of the stock on the date of the transfer.

## 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. For your convenience, we also maintain accounts with the brokerages listed below.

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.*

## CASH/WIRING INSTRUCTIONS

In preparation for initiating a wire transfer of funds to the WSU Foundation, please send the following information to our WSU Foundation Finance Team ([wsuf.finance@wsu.edu](mailto:wsuf.finance@wsu.edu)):

- Donor Full Legal Name
- Donor e-mail address
- Payer (Donor) Name
- Explanation/purpose of transfer. If available, attach a document from the person or organization that will be transferring the funds or a copy of the invoice sent to the payer
- Amount of transfer or approximate amount and currency
- Date expected or approximate date expected
- WSU Account number and name to which the funds are to be credited

**IMPORTANT:** To guarantee timely and accurate processing of electronic funds transfers, please include the following information in the details of your transaction:

- Contact Name at Washington State University
- WSU Department Name
- Name of individual or company sending the transfer

