

Giving a Gift of Securities to Bryant University

Gifts of securities such as stocks, mutual fund shares, or other appreciated assets can be a tax-efficient method for making a gift to Bryant University. In most instances, you can typically take a tax deduction for the full market value of the gift and avoid any capital gains tax (please consult your tax advisor for specific information). Here is a quick guide to ensure the successful execution of your unrestricted, publicly traded securities.

If you physically hold the stock certificates, please complete only the signature section on the reverse side of the stock certificate and send to:

Jamie Grenon, Senior Director of Advancement Services
Bryant University
1150 Douglas Pike
Smithfield, RI 02917-1284

If the stock is held electronically in a brokerage account, please instruct your broker to electronically transfer the stock to:

Bryant University Account Number: X78-216601
DTC Number: 0226
Reference: Fidelity

(Administered by Fidelity Private Client Group)

Bryant University Federal ID Number: 05-0258810

It is important to note your name and the name of Bryant University in your transfer instructions so that we may credit you promptly and properly. In all cases, please complete the information below in advance of your transfer and fax it to us at 401-232-6514, Attention: Jamie Grenon or your development officer. If unable to fax this information to us, please contact Jamie Grenon at 401-232-6707 or contact your development officer to provide us with the information by telephone.

Name of Donor

Date

Home Address

Name of Broker

City, State, Zip

Name of security and # of shares

Daytime Telephone Number

Transfer Brokerage Firm

Email address

Gift Designation