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. 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:

Lisette Clem, 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:

Morgan Stanley Smith Barney, Inc.  
1 Financial Plaza  
19th Floor  
Providence, RI 02903

Primary Contact: Patricia Charron  
Financial Advisor  
(401) 276-5939  
(401) 861-2470 (fax)

2nd Contact: Kimberly Jones  
Senior Client Services Associate  
(401) 276-5902

Bryant University Account Number: 422-111055-273
Morgan Stanley Smith Barney DTC Number: 0015
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: Lisette Clem or your development officer. If unable to fax this information to us, please contact Lisette Clem at 401-232-6805 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 ____________________________