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