

## 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:

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:

**Bryant University Account Number: X78216601**  
**DTC Number: 0226**  
**Reference: Fidelity**

**(Administered by Fidelity Private Client Group – Contact: Diana Pope 800-544-3024 X12470)**

**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