



TRANSFERRING STOCK TO SEATTLE UNIVERSITY

Making a stock gift is an easy and tax-wise way to invest in Seattle University. A gift of appreciated securities saves taxes twice. You may receive an income tax deduction for the full market value of the donated shares if you've held the securities for more than one year, and you may avoid capital gains tax on the appreciation.

If you have your shares of stock in the brokerage account, you will need to provide your broker with the following information:

| | |
|--|---------------------------------------|
| Brokerage House: | Merrill Lynch |
| Broker Name: | Stephen Hollomon/Jens Pascucci |
| For the account of Seattle University | 335-04033 |
| The DTC Number is | 5198 |
| Seattle University's Tax ID is | 91-0565006 |

1215 Fourth Ave, Suite 2600
Seattle, WA 98161
Phone: (206) 464-3500
Email: kenneth_martin@ml.com

If you have the stock certificate(s) **in your possession** or would like to gift restricted stock or a mutual fund, please contact the Planned Giving Office:

Sarah Finney,
Office of Planned Giving
Seattle University
901 12th Avenue, ADMN 120
Seattle, WA 98122-1090
Phone: 206.296.6962
Fax: 206.296.6136
Email: sfinney@seattleu.edu



Stock Gift Transmittal Form

It is critical when making a gift of stock that you alert Seattle University in advance, so that the gift will be properly credited when received, and so that we may provide an accurate gift receipt.

This form is to help you in facilitating your stock gift to Seattle University. We will need the following information in order to process the stock gift. When you have completed this form, you may print and mail it to the Office of Planned Giving (address above), or fax it to the attention of Sarah Finney at (206) 296-6136, or send this information in an email to sfinney@seattleu.edu. For more information call Sarah Finney at (206) 296-6962.

Date _____

Donor Name(s): _____

Address: _____

Phone _____ Email _____

Name of stock being transferred: _____

Stock symbol: _____ Number of shares _____

Unrestricted (Seattle University Fund)

Restricted (School, College, Program, Endowment Fund):

(please specify purpose)

Stock brokerage firm: _____

Stock broker's name/phone number: _____

Stock to be transferred to SU through your broker to:

Seattle University's brokerage account at Merrill Lynch with Stephen Hollomon/Jens Pascucci
DTC #5198 ACCOUNT #335-04033