

Office of Institutional Advancement

**Notre Dame of Maryland University
4701 North Charles Street
Baltimore, MD 21210-2476**

(410) 532-3191

(410) 532-5752 fax

GIFTS OF STOCK

Notre Dame accepts gifts of stock or appreciated securities which may provide greater tax advantages for donors than gifts of cash. Donors receive an income tax deduction equal to fair-market value as a charitable gift and may avoid capital gains tax on the transfer. Below are three ways to give securities to Notre Dame. For more information, please call the Development Office or consult your accountant or financial advisor.

DELIVERING STOCKS BY BROKER

- To transfer stocks electronically, first notify the University of your intention to transfer the stock by calling Marisa Morris in the Advancement Office at (410) 532-3191.
- Please provide the following information:
 - Your name
 - Designation of your gift (if applicable)
 - Name and phone number of your broker
 - Brokerage firm and its address
- Please instruct your broker to transfer the stock via PNC Bank to Account A/C #21-46-001-3418060

Contacts at PNC:

Angelina Lowers, Relationship Manager
Institutional Client Services
PNC Bank, National Association
116 Allegheny Center P8-YB35-02-Z
Pittsburgh, PA 15212
(p) 412-807-3309 | (f) 866.303.8945
angelina.lowers@pnc.com

- DTC #2616
- Tax Identifier Number – 52-0591641
- Tax Exempt Number – 31007272

DATE OF TRANSFER

- The date of transfer is, by legal definition, the date on which you relinquished control of the stock. That means in the case of stock transferred via brokerage accounts, the day on which the transfer into a Notre Dame of Maryland University account occurred, *not* the day you instructed your broker to make the transfer and *not* the day on which the stock was sold.
- In the case of stock transferred via certificate or certificate and stock power, the date of transfer is the date we receive the certificate and/or stock power.

VALUE OF THE GIFT

- The value of the gift for tax purposes is the value on the date of transfer. The value is obtained by averaging the high and low for the stock on the date of transfer. In the case of stock or other securities that do not fluctuate in value but in which there is a difference between the bid and ask price, the official value is the average between the bid and ask on the date of transfer. These figures can usually be obtained from *The Wall Street Journal* for that day. The official value for tax purposes may be different from your profit or loss realized from the sale of the securities.

ACKNOWLEDGEMENT

- We will acknowledge your gift in writing as soon as we receive notice that the stock has been transferred into the Notre Dame of Maryland University account or as soon as we have received a signed stock certificate or signed stock power.

If you have any questions or would like additional information, please call our offices.

Office of Institutional Advancement

Marisa Morris (410) 532-3191

Emily Brungo (410) 532-3179

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