

End Of Year Gifts

As we begin to wrap up the year, in your conversations with friends of the college, please remember to highlight the [College of Arts and Sciences online giving page](#). Additionally, please refer to the University Advancement guide below for processing end of year gifts for the 2022 tax year. This information is also available on the [Seattle University main giving page](#).

The university will be closed for the holidays from Friday, December 23 until Tuesday, January 3. If you or a friend of the college are seeking assistance with making a year-end gift during this time, please call University Advancement's central phone at 206-296-6100, select option 4 and leave a message with your name and phone number. Messages will be checked throughout the day and a staff member will follow up as soon as possible.

To ensure the gift counts towards the 2022 tax year, please consider the following:

Payment Type	2022 Tax Deduction Deadline	IRS Required Proof of Gift Date	Special Instructions
Checks	Date the check is mailed	Postmark on mailing envelope OR Date on check if hand delivered to SU employee before Jan 1.	Please keep accompanying envelopes to help us verify mail date.
Credit Cards	Date the card is actually charged	Verification that the card was charged by midnight on Dec. 31	<p>The best way for a donor to ensure their credit card gift will count for 2022 is to make it online by December 31.</p> <p>If donors mail in a credit card donation, it must be received by our office prior to Thursday, December 22 at noon, so that we can charge it before the break.</p>
Stocks/Securities	Date that the SU brokerage account receives the stock transfer	Verification of transfer acceptance by Merrill Lynch on or before December 31, 2022.	<p>Stock transfer instructions can be found on the SU website and are also attached.</p> <p>Note that December 31, 2022, is a Saturday. Donors are encouraged to make gifts via stock with additional lead time.</p> <p>*Gifts of mutual fund take additional processing time. Merrill Lynch recommends that all gifts via mutual fund be coordinated with the brokerage by Monday, December 19 to ensure sufficient processing time.</p>

Payment Type	2022 Tax Deduction Deadline	IRS Required Proof of Gift Date	Special Instructions
IRA Rollover Checks	Date the funds are withdrawn from the individual's IRA account	IRA Administrator withdraws gift funds by December 31, 2022 or if using a personal IRA checkbook, check must be deposited by December 31, 2022.	Due to SU's holiday closure, gifts made from personal IRA checkbooks, must be received by our office prior to Thursday, December 22, 2022 at noon , so we can deposit them before the break.

Thank you in advance for your help. During this period, if your department receives a donation and you are unsure how to move forward, please contact Katie Chapman and Josh Marron. Please include any additional information you have regarding uses for the donation. We will be sure to process the gift in accordance with the end of year guidelines and send the donors their acknowledgement and receipt.

We hope you and yours enjoy this holiday season! Thank you!



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	8862
Seattle University's Tax ID is	91-0565006

1215 Fourth Ave, Suite 2600
Seattle, WA 98161
Phone: (206) 464-2822
Email: stephen_hollomon@ml.com
jens.pascucci@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 Advancement Services:

Martine Ryan
Advancement Services
Seattle University
901 12th Avenue, ADMN 305B
Seattle, WA 98122-1090
Phone: 206.220.8466
Email: gifts@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 Advancement Services (address above), or send this information in an email to gifts@seattleu.edu. For more information call Martine Ryan at (206) 220-8466.

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 #8862 ACCOUNT #335-04033