



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:

Aaron Clarry
Advancement Services
Seattle University
901 12th Avenue, ADMN 305B
Seattle, WA 98122-1090
Phone: 206.296.6108
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 Luana Ma 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