

University of St Andrews American Foundation, Inc.

HOW TO MAKE A GIFT OF STOCK TO UNIVERSITY OF ST ANDREWS AMERICAN FOUNDATION INC.
FY2022-2023

Thank you for considering making a gift of stock to the University of St Andrews American Foundation Inc. An outright gift of appreciated securities or stock is an easy way to make a valued gift, avoid capital gains tax and receive an income tax deduction for the fair market value of the stock at the time of the gift.

The process for making a stock gift is outlined below:

1. Please email the University of St Andrews American Foundation Inc. c/o Development Office at donate@st-andrews.ac.uk to advise us of the intended stock gift. If you wish us to make the arrangement with your broker, please provide their details and we will be happy to contact them directly.
2. Please see the table below for the details of our brokerage account with Merrill Edge.
3. Once the transfer has been made please email donate@st-andrews.ac.uk with information about the number of shares, Security Name / Ticker symbol and date of transfer. This will assist us with the identification, allocation and receipt of your gift of stock. Please also provide your gift designation and any other relevant information to enable us to record your support accurately, for example if the gift is anonymous.
4. Once the transfer is complete, the University of St Andrews American Foundation will issue a receipt. This receipt will include information about the stock transferred and values for internal recording purposes only. For tax purposes, you should seek guidance from a tax professional in determining your deductible amount.

For further information or assistance please contact: Susan Donald, Development Officer (Operations)
E: donate@st-andrews.ac.uk T: +44(0)1334 461906

Stock Gifts	
Brokerage Firm Name:	Merrill Edge
Account name*:	Unvrsty of St Andrews American Fndtn Inc
Account No:	5F6-48P23
DTC:	8862

**this is the correct shortened title*

Updated September 2022

The University of St Andrews American Foundation, Inc. is a Georgia nonprofit corporation which is exempt from US tax as an organization described in sections 501(c)(3) and 170(b)(1)(A)(vi) of the Internal Revenue Code (Tax ID: 58-1662222). Registered Address: c/o Alston & Bird, 1201 West Peachtree Street, Atlanta, GA 30309-3424

Please address any enquiries to:
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