

# Making a gift of stock in three easy steps!

Appreciated securities are a great way to make a gift to the Shippensburg University Foundation. In addition to your charitable income tax deduction, you may avoid paying capital gains tax on your appreciation!

## Making a gift using stock... *If a broker holds the stock:*

1. Inform the broker that you wish to transfer shares to the SU Foundation.
2. Provide your broker with the following information:

Orrstown Bank  
DTC Participant #: 2116  
FFC A/C #: 010039795139  
A/C Name: ORT & CO  
AGENT BANK #: 10016  
Institution ID #: 77344  
Memo Section Reference: Shippensburg University Foundation

3. **Inform the SU Foundation** that you are transferring stock to facilitate proper crediting of your gift. **Please note: The donor's identity is not included with the stock transfer.** We will need to know the donor's name, the type and number of shares to be transferred, and what area or initiative you wish to support.

## Making a gift using stock... *If you hold the stock:*

1. Simply sign the back of the stock certificate in the appropriate location
2. Acquire a medallion signature guarantee from a bank or broker
3. Personally deliver or send by certified mail the stock certificate to the SU Foundation at 500 Newburg Road, Shippensburg, PA 17257

The value of your gift is determined by averaging the high and low price of the stock on the day the SU Foundation obtains possession. The date of transfer is the date of delivery. If the transfer is by mail, it is the date of the postmark. Reg. 1.170A-1(b). If mailing the stock certificate, it should state delivery is effective generally when postmarked.

**If you have any questions, please call the SU Foundation at (717) 477-1377.  
Thank you for choosing to help students at Shippensburg University!**



**Shippensburg University**  
**FOUNDATION**

500 NEWBURG ROAD, SHIPPENSBURG, PA 17257 | [SUFoundation.org](http://SUFoundation.org)