How to make a gift of stock to University of St Andrews American Foundation Inc.
FY2021-2022

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 would like us to make the arrangement with your broker, please provide their details and we will be happy to contact them directly.

2. We will provide you / your broker with the necessary transfer information to ensure the details are up to date. Our brokerage account is with Merrill Edge – please see account details below.

3. Once the transfer has been made it is important that you 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

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<thead>
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<th>Brokerage Firm Name:</th>
<th>Merrill Edge</th>
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<td>Unvrsty of St Andrews American Fndtn Inc</td>
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<td>Account No:</td>
<td>5F6-48P23</td>
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<tr>
<td>DTC:</td>
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*Correct shortened account name

Updated December 2021