University of St Andrews
How to Make a Gift of Stock

Thank you for considering making a gift of stock to the University of St Andrews. An outright gift of appreciated securities, or stock, to the University of St Andrews is an easy way to make a valued gift and possibly receive tax credit for the fair market value of the stock at the time of the gift.

Information about how to make a stock gift is outlined below. Please do not hesitate to contact us if you have any questions. E: donate@st-andrews.ac.uk or T: 011 44 1334 461906.

Making a Gift of Stock

1. Please email Susan Donald, Development Officer (Operations) c/o the Development Office at donate@st-andrews.ac.uk with the name and contact details for your broker and details of the stock including number of shares and approximate value. We will then notify the University’s broker, who will contact your broker to initiate the transfer.

2. The University broker, on receipt of the relevant information and confirmation that the stock has been transferred, will notify the Development Office.

3. The Development Office will record the value of your gift at its value on date of transfer, and will provide you with an appropriate acknowledgement, recognised by the Canada Revenue Agency.

PLEASE NOTE:
Donors wishing to make an end-of-year gift of stock are encouraged to make the gift by electronic transfer so that stock certificates sent through the mail are not held up due to limited staffing at this time. Stock donations should be received and processed by the end of day December 13, 2017. After this date, please contact the Development Office by calling 011 44 1334 461906 to discuss details. In addition, please note that the securities exchanges may be closed during this time due to the observance of the seasonal holidays.