GIFTS OF STOCKS AND SECURITIES

A gift of appreciated stocks and securities that you have held for a year or longer can have significant tax advantages. You may receive an immediate income tax deduction for the fair market value of the stocks on the date of transfer and the IRS allows you to make the transfer without recognizing the capital gains on the appreciation.

If the stock/security is held by your bank or broker:

• It is important that you notify us in advance of making a gift of stocks/securities. Without such notice, gifts of stocks or securities may be transferred to us without the identity of the donor being known, making proper credit and timely acknowledgment extremely difficult. In addition, you need to inform us as to where you would like your gift directed.

• Call your broker and inform him/her that you want to transfer shares to the University of Northern Iowa Foundation. Please have your broker wire transfer the stock from your brokerage account to the UNI Foundation’s account at Morgan Stanley. This type of wire transfer is done via the DTC system and the wire transfer contact for UNI Foundation is listed below:

  Morgan Stanley  
  DTC #0015  
  Account #949-033273-171  
  Contact: Amanda Gallagher  
  Graystone Consulting  
  (866) 273-3726

If gifting physical certificates to the UNI Foundation:

• If you'd like to gift the physical certificate to the university, please call our Director of Gift and Legacy Planning to begin the process:

  Jane Halverson  
  Senior Director, Gift and Legacy Planning  
  University of Northern Iowa  
  Cedar Falls, IA 50614-0282  
  (319) 273-4665  
  jane.halverson@uni.edu

IMPORTANT NOTICE: The UNI Foundation and its employees do not provide legal, tax or financial advice. When considering a gift to charity, we recommend you visit with your attorney, tax, and financial advisor(s) for guidance on making a gift that best meets your personal, tax, financial and charitable goals.