



CALIFORNIA STATE UNIVERSITY, DOMINGUEZ HILLS

INSTRUCTIONS

GIFTING SECURITIES TO CALIFORNIA STATE UNIVERSITY, DOMINGUEZ HILLS (CSUDH)

Gifting securities (stocks, mutual funds, bonds) to CSUDH offers **tax advantages over cash gifts**. you avoid long-term capital gains tax and may deduct the full market value of the securities on your tax return.

For tax purposes, your gift will be valued on the average price (the mean between the highest and lowest selling prices) of the securities on the date of the gift, which is the day the security is received into our account.

We encourage you to always discuss any charitable donations with your tax consultant or finance advisor to maximize your tax benefits and understand the gift's impact on your financial situation.

A SIMPLE ELECTRONIC TRANSFER FROM A BANK OR BROKER

If your bank or broker holds your securities, we recommend an electronic transfer in two steps.

STEP 1

Please give your bank or broker the following information. Instruct your bank/brokerage to list your name in the transfer paperwork so we can properly match the transfer to you. Send securities to:

Receiving Bank: **Morgan Stanley Smith Barney**
Receiving Entity: **CSUDH Philanthropic Foundation**
Tax ID **47-3097839**
DTC **0015**
Account **835-011097**

Financial Advisor: Andrew Aviles
andrew.aviles@msgraystone.com | 707.571.5733

Maria Echaide
maria.echaide@msgraystone.com | 707.571.5751

STEP 2

Alert CSUDH about the incoming gift. Email transfer details to development@csudh.edu and Cc: GiftAdmin@csudh.edu so we can be on the lookout for the gift. Leaving out this important step will cause a delay in identifying you, processing your gift, and recognizing you as the donor. Please include the following information in your email that will serve as your statement of intent as to CSUDH's use of the funds:

- Your name, address, email, and the best phone number to reach you at
- Name and ticker symbol of the security you are transferring
- Number of shares
- Name and DTC# of the broker/bank initiating your stock transfer
- Estimated date of the transfer
- Designation of your gift (name of the gift fund)