

Making a Gift of Securities

The gift of securities offers two tax advantages: The donor avoids capital gains tax on the appreciated value of the securities and may make a charitable deduction on his/her federal income taxes for the full market value of the security as of the date of transfer to the College. Securities that have been held for one year or more are deductible up to 30 percent of the donor's adjusted gross income; the balance may be carried forward within the same limitation for up to five years.

Gifts of Stock

Instructions for transferring stock to New College are to be sent electronically through DTC (shares held at a bank, brokerage house, etc.) are as follows:

Step One:

Direct your broker or custodian bank to make a transfer to New College Foundation. Your broker is likely to ask you for a letter of instruction before the transfer can be made. Provide the following DTC (Depository Trust Company) transfer information for New College Foundation to your broker or custodian bank:

BMO Harris Bank, Chicago IL

LPL Financial

DTC 0075

FCA New College Foundation account # 6755-8933

Reference: (donor name & purpose of gift)**

**without this note, gifts are difficult to identify.

Step Two:

Notify New College Foundation of your gift. Send a copy of your letter of instructions to:

Email: rmcdonough@ncf.edu

Phone (941) 487-4672

Fax: (941) 487-4680

Mail: New College Foundation

Attn: Finance

5800 Bay Shore Road

Sarasota, FL 34243

Please include the following information:

Name and address

Name of Security

Number of Shares

Purpose of the Gift

Name of your Brokeragefirm

PLEASE NOTE: Your gift will be dated according to the day the shares enter New College Foundation's account at BMO Harris. The value of the gift will be based on that date.

Year-end gifts: Be sure to allow extra time for the transfer from your broker's account to New College Foundation's account at BMO Harris. Please emphasize to your broker the importance of completing the transfer by December 31. When December 31st falls on a weekend, the transfer should be completed by the preceding Friday.

