

Making a gift of Stocks, Bonds or Mutual Funds
to the Youngstown State University Foundation

Funding philanthropic gifts through the transfer of stocks, bonds or mutual funds has become a preferred giving method for charitable donations. By means of gifting securities, the donor realizes a tax deduction of the full market value on day of receipt of security and avoids capital gains and income taxes.

Call your broker or trust officer, and ask them to make an electronic transfer (DTC) of shares from your portfolio to the Youngstown State University Foundation.

Prior to transferring securities, please inform the YSU Foundation by telephone or e-mail of:

- Name of security
- Number of shares to be gifted
- Approximate date of gift
- Broker name, telephone number and broker DTC number where transfer is originated

DTC delivery instructions:

Morgan Stanley

Participant (DTC) #0015

Account: 949-025918

Account Name: Youngstown State University Foundation

Attn: Mary Deasey: 614-473-2425, Mary.E.Deasey@msgraystone.com

As soon as your gift has been completed, the Youngstown State University Foundation will send you an acknowledgment letter and tax receipt for your gift. Additional contributions can be made to increase the value of the endowment while increasing the scholarship award.