

Gift of Securities Instructions



Giving securities is one of the most effective ways to give from a tax planning perspective. Giving publicly traded securities to Oregon Health & Science University Foundation that were purchased over a year ago and have increased in value can be an especially attractive way to fund a donation. A donor may benefit from a charitable deduction equal to the value of the securities. In addition to the tax deduction, capital gains taxes is not due on gain in the donated securities.

Information for Electronic Stock Transfer to Oregon Health & Science University Foundation

CHARLES SCHWAB & CO.

OHSUF Account #	5402-2136
Brokerage Depository Trust Company (DTC) #	0164
Tax ID#	23-7083114
Broker Address	Charles Schwab & Co, Inc. 820 SW Morrison Portland, OR 97205
Broker Telephone	(503)944-6802
Broker Contact	Michael DeVine

UBS FINANCIAL

OHSUF Account #	LL06769
Brokerage Depository Trust Company (DTC) #	0221
Tax ID#	23-7083114
Broker Address	UBS Financial 805 SW Broadway #2600 Portland, OR 97205
Broker Telephone	(503)221-5829
Broker Contact	Marie Richey

Please contact the [Gift Planning Department](#) via e-mail regarding the purpose of the gift when the transfer is made. If you have any questions, **please contact [Matt Lachmann](#) at 503-412-6370**. You are encouraged to leave a voice message or email message if no one answers. The facsimile number is 503-228-9588. If sending email, please use the **Contact Gift Planning** link on the left.

Thank you for your support.

Download **eBrochure** [Giving Securities Q&As](#)

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