

# Gift of Securities Instructions

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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.

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

### UBS FINANCIAL

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