



DE SMET JESUIT

Giving Publicly-Traded Stock to De Smet Jesuit High School

Using publicly traded stock to make a gift to De Smet Jesuit High School can be a very tax-wise method of giving, especially if the stock has appreciated in value since you acquired it. Giving appreciated stock saves you tax dollars in two ways.

- First, you will receive an income-tax deduction for the current value of the stock. This value is the average of the high and low price on the transfer date.
- Second, you avoid paying the tax on the capital gain of the stock.

How Do I Give Publicly-Traded Stock?

If the stock is currently held in a brokerage account: Simply request that your broker transfer the stock into the brokerage account of De Smet Jesuit High School. Your broker will require that you sign a document authorizing the transfer. De Smet's brokerage account information is:

Merrill Lynch
400 Chesterfield Center, Suite 200
Chesterfield, MO 63017

Account Number: 557-04359
DTC: Number: 8862
FBO: De Smet Jesuit High School

De Smet's Representative at Merrill Lynch: Richard Wurl Phone: (636) 537-4556

- De Smet Jesuit High School's Federal Tax ID Number: 43-1102368
- **PLEASE NOTIFY DE SMET THAT YOU HAVE MADE THIS TRANSFER.** Simply give us a call at (314) 567-3500 and ask for the Advancement Office, or mail us a letter with the details.

If you have stock certificates yourself: Simply date and sign where indicated on the back of each certificate. Then, send the certificates to De Smet Jesuit High School along with a "Relinquishment Letter" which has your notarized signature. Attached is a sample Relinquishment Letter that you may use. Simply fill in the blanks and sign it in front of a Notary Public. De Smet has a Notary Public on staff and we can usually arrange for notary service at no charge. The Relinquishment Letter should accompany your certificates when they are delivered to De Smet.