Giving a Gift of Securities to Westfield State University

Gifts of securities such as stocks, mutual fund shares, or other appreciated assets can be a tax-efficient method for making a gift to Westfield State University. In most instances, you can typically take a tax deduction for the full market value of the gift and avoid any capital gains tax. (Please consult your tax advisor for specific information.) Here is a quick guide to ensure the successful execution of your unrestricted, publicly-traded securities.

If you physically hold the stock certificates, please complete only the signature section on the reverse side of the stock certificate and send to:

Lisa McMahon, Interim Vice President, Institutional Advancement
Westfield State University Foundation, Inc.
P.O. Box 1630
Westfield, MA 01086-1630

If the stock is held electronically in a brokerage account, please instruct your broker to electronically transfer the stock to:

Westfield State University Account Number: 6809-0649
DTC Number: 0141
Reference:

Administered by Thomas Manzi, Wells Fargo Advisor,
1350 Main Street Springfield, MA
413-788-6111

Westfield State University Foundation, Inc., Federal ID Number: 04-2701694

It is important to note your name and the name of Westfield State University in your transfer instructions so that we may credit you promptly and properly. In all cases, please complete the information below in advance of your transfer. Attention: Lisa McMahon at 413-572-8645 or 413-531-0571.

_____ Name of Donor	_____ Date
_____ Home Address	_____ Name of Broker
_____ City, State, Zip	_____ Name of security and # of shares
_____ Daytime Telephone Number	_____ Transfer Brokerage Firm
_____ Email address	_____ Gift Designation