



## Consider Making a Gift of Stock

**One of the most advantageous ways to contribute to Yeshiva University is through a gift of stock. Making a gift of securities is simple and offers a number of valuable financial benefits:**

- You can donate appreciated stocks, bonds, or mutual funds
- The total value of the stock upon transfer is tax-deductible
- There is no obligation to pay any capital gains taxes on the appreciation

To contribute stocks see our 2-step instructions below.

## Stock Donation Instructions

### For Securities Held in a Brokerage Account

#### Step 1: Complete Transfer

Instruct institution where stocks are held to transfer the shares to the Yeshiva University brokerage account at Vanguard using the “DTC” transfer system. Please give your broker the following information:

**Account Name:** Yeshiva University Brokerage Account

**Account Number:** 41843384

**“DTC” Number:** 0062

**Tax ID Number:** 13-1624225

**Account Officer:** Ashley Nawrocki, Phone (610) 503-5687, Fax (610) 669-0959, email [ashley\\_nawrocki@vanguard.com](mailto:ashley_nawrocki@vanguard.com)

#### Step 2: Notify YU of Gift

In order for YU to identify your gift and send a tax receipt please send the gift details including the name of the stock, the number of shares, and date of transfer to Debra Schneiderman or 212-960-0014 or [donorrelations@yu.edu](mailto:donorrelations@yu.edu).

### For Securities Held in Certificate Form

#### Step 1: Signature

All registered owners must sign a STOCK or BOND power. The signature(s) must exactly match the name(s) shown on the certificate.

A bank or broker must guarantee the signature(s). The stamp must read “Signature Guaranteed–Medallion Guaranteed.” All other stamps, including notary public stamps, are not acceptable for the transfer of securities.

#### Step 2: Delivery of Securities

To protect against fraud, please send your securities to Yeshiva University via a messenger service or using Certified Mail–Return Receipt Requested to:

Yeshiva University Department of Institutional Advancement  
500 West 185th Street, BH 1013  
New York, New York 10033  
Attention: Debra Schneiderman

If you have any questions about donating your securities to YU please contact Debra Schneiderman, 212-960-0014 or [donorrelations@yu.edu](mailto:donorrelations@yu.edu).

**Thank you!**