Securities as Charitable Gifts

Gifts of securities can offer significant tax benefits for a donor. For example, contributions of appreciated securities held for over a year are generally deductible at market value, regardless of what the donor paid for the securities. In addition, the capital gain tax can be avoided.

When making a gift of securities to Chico State (The University Foundation) it is extremely important to have complete donor information (Name, address, phone number), the name and type of securities to be gifted (public, private, restricted, mutual fund, etc.), number of shares and the date you intend to make the gift.

➢ Electronic Transfer

It is important for Chico State to know the identity of the donor for all securities gifts in order to give prompt and accurate credit for all gifts received.

Particularly in the case of an electronic transfer, it is often very difficult to obtain this information after the transaction is processed. Therefore, in addition, please request your broker to include your name and address in the DTC transfer instructions.

Please contact Gary Salberg, Director of Major Gifts & Planned Giving.
Phone: 530-898-5297   Email: gsalberg@csuchico.edu

TRANSFER INSTRUCTIONS
Brokerage Firm: Charles Schwab & Co.
Account: University Foundation, CSU, Chico
Account #: 2207-2139
DTC #: 0164
Tax ID #: 95-1230865

Official Address:
THE UNIVERSITY FOUNDATION, CSU CHICO
400 WEST FIRST – BLDG #25 - 0246
CHICO, CA  95929