



Making Gifts of Securities to Concordia

Making a gift of securities, especially appreciated stock, offers two advantages—a charitable income tax deduction and the elimination of a capital gains tax. There are three ways that you can transfer securities to Concordia: electronic transfer, U.S. Mail, or hand delivery.

Electronic Transfer

The most efficient way to make a gift of securities is through an electronic transfer. If a broker holds your stock, notify your broker that you wish to make a gift of securities to Concordia College New York. Be certain to indicate the name of the stock you want to transfer, the number of shares, and how you would like the gift to be used once it is received by Concordia. Please have your broker use the following information when wiring securities to Concordia:

To: Morgan Stanley
From: Broker's Name
DTC: #0015
For Account: Concordia College New York
Account #604-088664-140
Tara Kelsey
Attention: (610) 954-6829

It is also very important that you notify the College of the name, ticker symbol and quantity of the securities that you intend to donate. This will allow us to acknowledge your gift in a timely manner. You may contact Lauren Servidio, Gift Intake Coordinator, at (914) 337-9300 x2465 or at lauren.servidio@concordia-ny.edu.

Mail and Hand Delivery of Share Certificates

You (or the registered certificate holder) should complete the back of the certificate(s), assigning the appropriate number of shares to Concordia College New York. Place the unendorsed certificate(s) and a cover letter (including your name, address, and purpose of the gift) in one envelope. In a second envelope, place a signed, signature guaranteed, stock power form (you can obtain one from your broker or local bank). The stock power form must be signed, but do not complete the form.

Send the two envelopes via registered mail or hand-deliver them to Concordia's Office of Institutional Advancement. Hand-delivery will allow for a personal meeting and an immediate receipt for the securities.

Mail to:

Concordia College New York
Office of Institutional Advancement
171 White Plains Road
Bronxville, NY 10708

For tax purposes, the date of the gift is the date on which Concordia assumes complete control of the securities. For securities sent through the mail, the gift date is the postmark date on the envelope. For hand-delivered and non-U.S. Mail, the date of the gift is the date received. For securities held in an account, it is the date it was transferred into Concordia's account. The donor receives a full credit of the mean value of the stock on the gift date.