



Stock Transfer Form

Please follow these steps to notify Judson University of your donation:

1. Contact your broker to initiate the transfer of your securities to Judson University (EIN: 36-2515868).
2. Please complete this form at the time of the gift transfer so we can accurately identify, allocate, and acknowledge your gift. Send this form to:

Advancement Department

Judson University

1151 N State St

Elgin, IL 60123

Phone: 847-628-2017

OR email the information to: kristen.egan@judsonu.edu & walter.lopez@judsonu.edu

Name: _____

Address: _____

Securities Gifted

Number of Shares _____ Name of Securities _____

Date of Transfer _____

Designation

_____ Where needed most _____ Other: _____

Transferring Broker _____

Company _____ Phone _____

Electronic Transfer Information

Our Broker: **Pershing LLC**

Account #: **ADV-224938**

DTC #: **0443**

Account Name: **Judson University**

Stock Transfer Form (continued)

Valuation

The value of your gift will be the average of the high and low trading prices on the date we receive your gift. The date of the gift is the day Judson University receives ownership of the security.

Benefits

Your gift may provide you with federal and state income tax benefits:

- If you itemize deductions on your federal income tax return, you may be able to deduct your contribution to Judson University from your adjusted gross income. In addition, gifts of appreciated property avoid long-term capital gains tax. Check with your tax advisor for deduction and capital gains tax requirements and limitations for your situation.
- Your state may also allow a credit or deduction so you should ask your tax advisor.

Thank you for your gift to Judson University!