

GIVING PUBLICLY-TRADED STOCK TO SLUH

Using publicly-traded stock to make a gift to Saint Louis University High School can be a very tax-wise method of giving, especially if the stock has appreciated in value since you acquired it. Giving appreciated stock saves you tax dollars in two ways:

- First, you will receive an income-tax deduction for the current value of the stock. This value is the average of the high and low trading price on the transfer date.
- Second, you avoid paying the tax on the capital gain of the stock.

HOW DO I GIVE PUBLICLY TRADED STOCK?

If the stock is currently held in a brokerage account: Simply request that your broker transfer the stock into the brokerage account of St. Louis University High. Your broker will require that you sign a document authorizing the transfer. SLUH's brokerage account information is:

Wells Fargo Advisors, LLC
14567 North Outer 40 Drive
Chesterfield, MO 63017

Account Number: 5885-6162
DTC Number: 0141
FBO: St. Louis University High School

IMPORTANT NOTE: To ensure that SLUH and Wells Fargo Advisors, LLC are properly notified of the gifted securities, please remind your broker to provide clear delivery instructions to Wells Fargo Advisors, LLC by providing YOUR NAME as the donor.

SLUH's Representative at Wells Fargo Advisors, LLC: Gary Saeks, Vice President-Investments
Phone: (636) 530-6111

- St. Louis University High School's Federal Tax ID Number: 43-0662506.
- **PLEASE NOTIFY SLUH THAT YOU HAVE MADE THIS TRANSFER.** Simply give us a call at (314) 269-2084, or mail us a letter with the details. Notification can also be made via e-mail to aaantony@sluh.org.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC
Wells Fargo Advisors is not a legal or tax advisor.