

## 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  
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 are properly notified of the gifted securities, please remind your broker to provide clear delivery instructions to Wells Fargo Advisors by providing YOUR NAME as the donor.

SLUH's Representative at Wells Fargo Advisors: 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) 531-0330 x2084, or mail us a letter with the details. Notification can also be made via e-mail to [dsokolowski@sluh.org](mailto:dsokolowski@sluh.org).

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC