

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
14767 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, First Vice President-Investment Officer
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 aanony@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.