



Making a gift of appreciated securities

Most gifts of appreciated securities that have been held long term are fully deductible at fair market value, and the donor does not incur a tax on unrealized capital gain.

INSTRUCTIONS

Your financial institution will need the following information to make the transfer:

Wells Fargo Advisors Financial Network LLC

14767 North Outer Forty Drive, Suite 201

Chesterfield, MO 63017

636-735-3018 or 636-735-3025

DTC #: 0141

Acct. Name: Washington University

Acct. #: 6457-3816

Attn: Matthew Erbacher - Vice President – Investment Officer

Tax ID #: 43-065-3611

Due to the increased privacy regulations set forth by FINRA (Financial Industry Regulatory Authority), which oversees financial institutions transferring proposed donations, Washington University may be unable to obtain specific donor information associated with the assets that arrive in our account.

To avoid this issue, please notify Washington University of the specific securities donation details you have initiated. Please contact Marissa (Speno) Barnes in Accounting Services (314-935-5761 or mspeno@wustl.edu) or ask your University Advancement staff coordinator to forward this information.