GIFTS OF STOCK MAY OFFER TAX BENEFITS

A current gift of appreciated stock or mutual funds instead of cash may have tax benefits. By using appreciated assets that were purchased more than one year ago, the “cost” of making the gift is less than using cash, as you avoid any recognition of the capital gain. For example, if you bought a stock for $1,500 and it was now worth $2,500, you could gift that stock, get the $2,500 deduction and avoid the tax on $1,000 in capital gains. The gift value is based on the average of the high and low trading prices on the date the stock is received in our Foundation account and may be slightly more or less than you expect. There is still ample time to make a stock gift in 2013 if you wish to claim the deduction on this year’s taxes.

SECURITY DELIVERY INSTRUCTIONS

DEPOSITORY TRUST (DTC) (Preferred method) the donor should contact his/her broker to authorize transfer of securities

Send a fax notice to Gift Acceptance, Melissa Ivanusich at 530-754-1156 or call 530-754-1133, maivanusich@ucdavis.edu prior to initiating transfer. Email Norma DeLiberty (ndeliberty@ucdavis.edu) that you are sending a donation for the Mokhtarian Fund. Indicate the number of shares and type of securities.

The shares will be transferred electronically using the following delivery instructions.

Account Name: UC Davis Foundation
Account Number: 848-01678-1-9
DTC Number: 0057
Agent: Edward Jones
Attention: Michael Clark
Edward Jones 429 F Street, Davis, CA 95616
Tel: (530) 753-3917
Fax: (888) 770-9157

PHYSICAL

- In one envelope send a gift letter stating the purpose of the donation along with the unendorsed stock certificate(s).

- In a separate envelope send us a stock power with your signature only. Please include a stock power for each certificate you are gifting. Also reference donor’s name and address.

Mail certificate to:

UC Davis Foundation
Attention: Melissa Ivanusich
One Shields Avenue
Davis, CA 95616