

INSTRUCTIONS: GIFTING SECURITIES TO WHITTIER COLLEGE

Gifting securities (stocks, mutual funds, bonds) to Whittier College offers tax advantages over cash gifts. You will receive credit for the full market value of the securities and will avoid capital gains tax. Effective date and valuation are calculated using the mean of the highest and lowest selling prices quoted for the securities on the date of the gift, which is the day the security is received into the Whittier College account. Always discuss donations with your tax consultant to maximize your benefits.

A SIMPLE ELECTRONIC TRANSFER FROM A BANK OR BROKER

If your bank or broker holds your securities, we recommend **an electronic transfer** in two steps.

STEP 1: Please give your bank or broker the following information. Instruct your bank/brokerage to list your name in the transfer paperwork so we can properly match the transfer to you. Send securities to:

Wells Fargo Advisors L.L.C.
c/o Mr. Ryan P. Hawkins, CFP
Associate Vice President-Investments
2400 E. Katella Ave., Suite 1000
Anaheim, CA 92806-5945

(800) 300-4428 – California
(714) 940-3119
(714) 456-9144 FAX

D.T.C.	#141
Whittier College Account	#8313-6985
College Tax I.D.	#95-1644048

STEP 2: Alert Whittier College about the incoming gift. Email transfer details to development@whittier.edu so we can be on the lookout for the gift. Leaving out this important step may cause a delay in recognizing you as the donor. Please include the following information in your email that will serve as your statement of intent as to the College's use of the funds:

- Name and email
- Name and ticker symbol of the security
- Number of shares
- Designation of your gift (name of the gift fund)

QUESTIONS?

Office of Advancement
development@whittier.edu
main line (562) 907-4219