



Gifts of Stock Instructions for Donors

Transferring stock is an easy and taxwise way to make a charitable gift to the University of Idaho. Please follow the instructions below so that the University of Idaho Foundation, Inc. can properly receipt your gift and direct it to the program or fund at the U of I that you wish to support.

Step 1 Please email invest@uidaho.edu, fax to 208-885-4040 or call 208-885-4000 with the following information:

- your name, address, email, and phone number
- the name and number of shares of the stock you are donating
- the program or fund at UI that you intend for your gift to support
- expected date of transfer

Step 2 Contact your investment firm and request the transfer of your stock to:

UBS Financial Services DTC #0221 (please include the 0)

For credit to: Account #WH00730

In the name of: University of Idaho Foundation, Inc.

Tax ID #23-7098404

The Foundation UBS account representative is Greg Hotchkiss (800-824-9212)

Only if your account is with D.A. Davidson, your broker may contact:

Brad Rice, CWS®

Senior Vice President, Financial Advisor

D.A. Davidson / Lewiston Wealth Management

208-743-0818 or 800-237-2814

Step 3 The Foundation will send you a receipt for the value of the gift, which will be the average of the high and low share price of the stock on the date it is credited to the Foundation's UBS Financial Services account or D.A. Davidson account.

To give other securities or to give cash by wire transfer: If your stock is in certificate form, or if you want to give mutual funds, bonds, foreign or restricted stock, or give cash by wire transfer, please call the director of finance or accounting manager at the Foundation at 208-885-4000 or email invest@uidaho.edu for instructions.

More information about the benefits of gifts of stock and other assets is available online at: <https://myidaholegacy.org/ways-to-make-a-lasting-impact/other-ways-to-give/>

Thank you for your interest in supporting the University of Idaho!