



GIVING STOCK TO GENESEO

Securities may be given at their present market value as an outright gift to the Geneseo Foundation. Gifts of appreciated securities offer tax advantages as they provide an income tax deduction based on the stock's fair market value. When transferring securities, it is important to use our full legal name and correct address:

**The Geneseo Foundation, Inc.
Doty Hall, SUNY Geneseo
1 College Circle
Geneseo, NY 14454**

**Phone (585) 245-5518
Fax (585) 245-5514 or Email (myers@geneseo.edu)
Federal Tax ID: 23-7104179
DTC information below**

It is the policy of the Foundation to sell stock immediately upon transfer.

TO DONATE STOCK BY ELECTRONIC TRANSFER

- Deliver a completed copy of the attached Transmittal Form to both your broker and the Geneseo Foundation via email or fax. Your broker will institute the wire transfer to:
Participant #2027, Agent Bank ID# 94866, Wells Fargo Account #25835900 [GENESEO FOUNDATION INC.]
- Email (myers@geneseo.edu) or Fax (585) 245-5514 -- Attn: Lynn Myers, Director of Adv. Services

TO DONATE STOCK BY MAIL

- Use registered mail to send unendorsed stock certificates and a letter of intent stating the name and number of shares of stock to be transferred and the purpose for which your gift is to be used. If the certificate(s) represent more shares that you intend to give, you will be issued a new certificate for the remaining shares.
- In a separate envelope, mail to the Geneseo Foundation a signed stock power form with a medallion guarantee seal and a completed disclaimer form. These forms are available from the Geneseo Foundation.

TO DONATE STOCK IN PERSON

- Bring the certificates to the Geneseo Foundation Office, Doty Hall 244.
- Provide a letter of intent stating the name and number of shares of stock to be transferred and the purpose for which your gift is to be used.
- Provide a signed stock power form with a medallion guarantee seal and a completed disclaimer form. These forms are available from the Geneseo Foundation.

VALUATION

- The value of a gift of stock is determined as the delivery date when the securities pass unconditionally from your control. The IRS stipulates that the gift value be determined by calculating the mean between the high and low quotations on the delivery date the transfer takes place.

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