



Giving a Gift of Stock

There are three primary methods for making gifts of stock to Clemson University: transfer through brokerage accounts, delivery of certificates, and reissue of certificates in the name of Clemson University Foundation (CUF).

Instructions for making these gifts are outlined below. For questions or help with your donation, please contact Ms. Blake Beckwith at 864-656-5656 or blbeckw@clemson.edu.

1. TRANSFER OF GIFTS THROUGH BROKERAGE ACCOUNTS:

- A. A donor may instruct his or her broker to have the stock transferred directly into the Clemson University Foundation's account with UBS Financial Services. The date of the gift is the date the securities are received in CUF's account. The account information is below.

Brokerage: UBS Financial Services
Account Name: Clemson University Foundation
Account Number: BL 40134 67
DTC Number: 0221

Contact: Will Bragdon
Phone: 864-232-5101
Address: 17 W. McBee Ave
Greenville, SC 29601

- B. The Clemson University Foundation also has accounts with various brokerages. For information on how to use a different brokerage, please contact Ms. Blake Beckwith at 864-656-5656 or blbeckw@clemson.edu.

Note:

- In order to give the donor appropriate gift credit in a timely manner, the donor or his or her broker must alert the Clemson University Foundation of the incoming donation. You may alert Ms. Blake Beckwith at 864-656-5656 / blbeckw@clemson.edu or Molly Dunlap with UBS at 864-241-6339 / molly.dunlap@ubs.com.
- Donors should not give sell instructions to their broker. The tax court has held that the gift is not complete unless the stock is transferred to the charity's account. Instructions to your broker to sell stock and transfer the proceeds to the charity are not sufficient to complete the gift.

2. DELIVERY OF STOCK CERTIFICATES:

A. By Hand:

Donors may bring stock certificate(s) to the Clemson University Foundation office in person. Prior to leaving the certificate(s) at our office, the back of the certificate(s) should be dated and signed by the owner(s) as listed on the front of the certificate(s) and the signature(s) guaranteed by a bank. Some, but not all, brokerage firms will guarantee signatures. This is also known as a medallion signature guarantee. Notary signatures will not suffice for signature guarantees. The donor(s) must sign the certificate(s) in the presence of the bank or brokerage official. The donor(s) must also complete a letter of authorization form (request from CUF) and provide a copy of their driver's license.

Hand deliveries may be made to:

Clemson University Foundation
155 Old Greenville Highway, Suite 105
Clemson, SC 29631

B. By Mail:

Donors may mail stock certificate(s) to the Clemson University Foundation. The date of the postmark is the date of the gift. Mailed securities must be completed in two parts:

1. The original stock certificate(s) should be sent via certified and registered mail. This is especially important if any of the certificates are endorsed. (Please be aware that some of the mailing services will not insure securities.)
2. An Irrevocable Stock or Bond Power should be signed as listed on the stock certificate(s), dated with the signature(s) guaranteed by the donor's local bank or brokerage official and mailed separately via certified and registered mail. Please include a note linking the stock power to the stock certificate(s).

Mail deliveries may be sent to:

Clemson University Foundation
ATTN: Ms. Blake Beckwith
PO Box 1889
Clemson, SC 29633

3. REISSUE OF CERTIFICATE IN NAME OF FOUNDATION:

A certificate may be submitted to the issuing company or its registrar and a new certificate issued in the name of Clemson University Foundation. The date of the new certificate is considered the date of the gift. Please keep in mind this method can be a lengthy process and may not be feasible for last-minute gifts. This method may not be well suited for all gifts of stock. Please discuss this option with CUF before reissuing your stock certificate.

