



**Providence College**  
**Office of Institutional Advancement**  
**549 River Avenue, Providence RI 02918**  
**401-865-2414 Phone**  
**401-865-2966 Fax**

### **Giving a Gift of Securities to Providence College**

**Gifts of securities** such as stocks, mutual fund shares, or other appreciated assets can be a tax-efficient method for making a gift to Providence College. In most instances, you can typically take a tax deduction for the full market value of the gift and avoid any capital gains tax. Here is a quick guide to ensure the successful execution of your unrestricted, publicly traded securities.

**If you physically hold certificates** complete only the signature section on the reverse side of the stock certificate and send to:

Anthony McMahon  
 Providence College  
 Office of Institutional Advancement  
 1 Cunningham Square  
 Providence, RI 02918

**If the stock is held in a brokerage account**, simply instruct your broker to electronically transfer the stock to:

**UBS (Paine Webber)**  
**DTC #221**  
**Account #RH07039-74**  
**Providence College**  
**Attn: Chris Hall (or Doug Bennett)**  
**(401) 455-6777**

**OR**

**Merrill Lynch**  
**DTC #5198**  
**Account #880-04239**  
**Providence College**  
**Attn: Craig Taliento (or Seth Adams)**  
**(860) 447-7440**

Notify Anthony McMahon of your gift by faxing a copy of the transfer instructions or this statement to 401-865-1451. If you are transferring mutual funds, restricted stocks, or closely held securities, contact Anthony McMahon at 401-865-2845.

\*It is important to note the name of Providence College. Please make sure your broker includes **Providence** and **your name** in the transfer information so that we may credit you promptly and properly.

**In all cases, please complete the information below in advance of your transfer and fax it to us at 401-865-1451. If unable to fax this information to us, please contact Anthony McMahon at 401-865-2845, to provide us with the information by telephone.**

\_\_\_\_\_  
**Name of Donor**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Home Address**

\_\_\_\_\_  
**Name of Broker**

\_\_\_\_\_  
**City State Zip**

\_\_\_\_\_  
**Name of Security and # Shares**

\_\_\_\_\_  
**Daytime Phone Number Fax Number**

\_\_\_\_\_  
**Transfer Brokerage Firm**

\_\_\_\_\_  
**Email**

\_\_\_\_\_  
**Designation**