



## Make a Gift of Securities to the United Board

The United Board is pleased to accept gifts of stock or other marketable securities, which often generates greater tax benefits than an equivalent cash contribution. We will issue a receipt that states the date the securities came into the United Board's possession, the name of the issuing corporations or authorities, and the number of shares received.

The date of delivery and therefore the date of donation can be affected by the manner in which the transfer of stock is made, thereby affecting the value of the gift. This gift value is the average of the high and the low trading price on the date of the donation (or the next business day).

### **Donation Instructions:**

#### ***By Electronic Transfer (Broker to Broker):***

Instruct your broker to wire the donated shares(s) as follows:

Charles Schwab & Co., Inc.  
101 Montgomery Street  
San Francisco, CA 94104

Delivery to DTC Clearing 0164, Code 40  
For credit to United Board for Christian Higher Education in Asia  
Account number 2402-1970

Please also send a brief note or email to Gladys Malloy, Controller ([gmalloy@unitedboard.org](mailto:gmalloy@unitedboard.org)) at the United Board indicating the following: *I have instructed my broker [name] to transfer XXX shares of XXX Corporation to the United Board. [This contribution is designated for: XXXX.]*

#### ***By Mail:***

By certified or registered mail send the stock certificate(s) without endorsement but with an accompanying letter stating that the shares are being donated to the United Board.

In a separate envelope, send a signed stock power (available from your broker or from the United Board if you do not have any). Please send one for each separate certificate being donated. Simply sign the stock power where indicated - DO NOT fill in the date or any other information.

#### **United Board for Christian Higher Education in Asia**

Attn: Gladys Malloy, Controller  
475 Riverside Drive, Room 1221  
New York, NY 10115

The IRS will typically recognize the date of donation as the date of the postmark when the security is sent by mail.

**The IRS will typically recognize the date of donation as the date the stock is wired via DTC from the donor's account to the United Board's account.** The date of delivery is normally the date on which the donor has surrendered control of the stock. Because IRS regulations stipulate that it is the donor's responsibility to determine the value of the donated securities for tax purposes, the United Board urges donors to consult with their tax advisor(s).