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Calumet College

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of Saint Joseph

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**You Belong!**  
ccsj.edu

## Gifts of Stocks and Securities

Making a gift with appreciated stock is an exceptional way to support Calumet College of St. Joseph. In most instances, you will save on capital gains and receive an income tax deduction for a charitable gift while enabling the College to provide the best educational opportunities for students.

Here is a quick guide to ensure the successful execution of your gift of stocks/securities.

*If you physically hold the shares:*

The stock certificate and a stock power must be sent to Calumet College of St. Joseph. Your stock power must include a guaranteed signature. For security reasons, this information should be sent in a separate envelope from the stock certificate. Both items should be sent to:

Calumet College of St. Joseph  
**Office of Institutional Advancement**  
2400 New York Avenue, Room 619  
Whiting, IN 46394

*If the stock is held in a brokerage account, and the stock is simply being transferred:*

For your convenience, print the DTC Transfer Instruction Sheet form [here](#).

Cetera  
DTC #0701  
Account #2US15418  
for the benefit of Calumet College of St. Joseph

If using this method, please notify the Office of Institutional Advancement of the gift by sending a copy of the transfer instructions by email to [ediaz2@ccsj.edu](mailto:ediaz2@ccsj.edu) or fax to (219) 473-4259 (ATTN: Inst. Advance). This allows the gift to be identified when it arrives.

## **Acknowledgement and Gift Processing**

When the College receives a gift of securities and matches that gift to the donor, we will send a gift receipt verifying the nature of the gift, the gift valuation date and the gift valuation amount. Neither gains nor losses realized by the institution's sale of the securities after their receipt, nor brokerage fees or other expenses of the transactions are included in the gift value. If the stock transfer is related to an open pledge, the pledge balance will be reduced by the gift value of the stock gift. Generally, the gift value of a stock transfer will be directed to the donor designated purpose.