

Donating Gifts of Stock to Bentley University

Giving appreciated stock held for one year or more is often an excellent way to support the university.

These gifts often receive very favorable tax treatment. Consult your tax adviser for specific information. To complete the gift, please follow the steps below:

If your broker or bank holds the securities:

1. Please call your broker and let them know that you want to make a gift of stock to Bentley University. Your broker will want to know the name of the stock to be used, and the number of shares you are contributing.
2. Ask your broker to transfer this stock to the Bentley University account at Fidelity. The Bentley account number to use is Z50-706132. The DTC number to use is 0226. Our federal tax ID number is 041081650. Please Note: You will receive credit for your transfer on the date the securities are recorded in Bentley's Fidelity account. **Please Note:** You will receive credit for your transfer on the date the securities are recorded in Bentley's Fidelity account.
3. After notifying your broker, please call Betsy Whipple, executive director of development, at 781.891.2769. **Betsy will need to know the name and telephone number of your broker, the name of the stock and the number of shares you are contributing, and the purpose or designation of your gift, if known.** In the event Betsy is unavailable, you can speak with another staff member or leave a confidential voicemail message by calling 781.891.2891.
4. The university will notify you of the amount of your contribution based on the date that the transfer is complete. **Important Information:** Please remember not to instruct your broker to sell the stock and forward the gift to Bentley. This will jeopardize the excellent tax benefits you would receive if the university arranges for the disposition of your stock.

If you hold the stock certificate(s) yourself:

1. Please mail the certificate(s) via U.S. Postal Service (First Class Mail), without any endorsement or assignment, along with a letter stating the purpose of your gift (if known) to: Betsy Whipple, Bentley University, 175 Forest Street, Waltham, MA 02452
2. In a separate envelope, please send one endorsed Stock Power Form per certificate. Endorse each form exactly as your name (or names) appears in the front of your certificate(s). You do not need to provide any additional information on the Stock Power. We will complete it to process the gift properly. Send these forms to Betsy Whipple (see address above). If you need a Stock Power Certificate, please contact Betsy Whipple at 781.891.2769.
3. Your stock certificate(s) is not negotiable until we receive both envelopes from you, so it is a very safe way to give stock to the university.
4. Your date of the gift is established by the date of the postmark on the envelope. (If the two envelopes are mailed on different days, we will use the later of the two dates.) We will base the actual valuation of the stock on this date, and will provide you a detailed accounting of your gift for your tax records.

For more information, please contact [Betsy Whipple](#), executive director of development, at 781.891.2769.