

Did you know?

A gift of securities is a great way to give!

Contributing a gift of securities to Luther is a tax-smart way to transform the lives of Luther students. And it's easy to do.

A gift of publicly listed securities is a great way to give! (Often the best way!)

Here's why:

- Publicly listed securities given directly to Luther are taxed at zero percent on capital gains.
- You also may claim charitable tax credits – Luther will issue you a tax receipt.
- The combination of **zero tax on gains PLUS tax credits** means that you get higher financial benefits than with a gift of cash of the same amount.
- Because of the greater financial benefit, you can enjoy the savings of a lower cost to your gift.

Here are three quick questions for you:

1. Do you wish to make a gift that makes a positive impact on Luther students?
2. Do you own publicly listed shares that are freely tradable?
3. Have those shares increased in value since you acquired them?

If you answered “Yes” to all 3 questions, a gift of securities to Luther could be for you.

Check inside for more details!

Things you should know about making a gift of securities



Luther will cooperate with your advisors in every way possible. Some tips for you:

1. Luther will promptly provide you with a **Securities Transfer Form**. We will provide the necessary Luther information on the Form – all you have to do is supply **your** information.
2. Luther will issue a **tax receipt for the full value** of the securities. The value of the securities for the tax receipt will be calculated according to the closing price on the day that the shares arrive in Luther's account.
3. There is always a delay between the time you tell your broker to make the transfer and the time the shares arrive in our account. Market prices change constantly and share value could decrease on the arrival date. If you wish your transfer to complete on a particular day you must consult with your own broker about timing.
4. **We need you to tell us who you are** as the donor/transferor on the Securities Transfer Form so that we can issue a tax receipt. Our broker office does not normally receive this information!
5. Be sure to **check that you have provided all information** in full on our securities transfer form to avoid delays or even failure to settle.
6. If you are carrying actual share **certificates do not sign them!** Take them personally to your broker and sign a Power of Attorney instead.
7. Dividends, if any, that are paid out after Luther receives the shares are not eligible for a tax receipt.
8. Luther generally is not able to accept securities that are subject to restrictions. Flow-through shares may be accepted after the hold period has expired and after Luther has pre-approved their acceptance. Please call Luther's Development Office to get the approval process started.
9. If you want to make a **year-end** gift, do it in **early** December, rather than later, to ensure it is completed in time. Check with your broker for end-of-year deadlines!

We make it easy for you.

Just follow these 3 simple steps to make a gift of securities to Luther:

1. Read the Tips for Gifts of Securities sheet attached and contact Luther's Development Office:
Tel: 757-7399 Email: lchsalumni@luthercollege.edu
2. Fill out the one-page Securities Transfer Form that we send to you. If you receive it via email, print it first and complete it using dark ink.
3. Fax or email your completed form:
 - To your broker
 - To Luther at 306-359-6962 (fax) or lchsalumni@luthercollege.edu (email)

That's it!

We will alert our broker and we will take it from there.

Questions? Call Luther's alumni office at 306-757-7399

Always consult your broker to ensure best results for you.