



ALASKA PACIFIC UNIVERSITY

Stock Transfer Information

Alaska Pacific University welcomes gifts of appreciated securities. Many donors choose this type of gift because it is simple to execute and has many income tax advantages. Typically, donors get a tax deduction for the fair market value of the security, and can avoid capital gains tax if the stock is transferred to a qualified charity.

Once you decide to make this type of gift, transferring the stock to APU is simple:

- 1) Authorize your broker or agent to transfer the stock to Alaska Pacific University's account at Morgan Stanley.

Account # 114048120030 DTC# 15

Agent: Branch Haymans (907) 564-7129 (Anchorage, AK office)

- 2) If your agent requires the authorization in writing letter, prepare a letter that includes the following:

The date, the name of the stock and the number of shares you want transferred. If both of your names are on the account, be sure that you both sign the letter.

Sample letter text:

We hereby authorize the transfer of _____ shares of _____ stock to Alaska Pacific University's account #114048120030 held at Morgan Stanley.

If possible, please notify the Office of University Advancement (907-564-8250) of your gift, and provide the name of the stock and the number of shares you intend to transfer. This information will allow us to process your gift more quickly and accurately.

Once the transfer of the stock has occurred, we will notify you and provide you with the appropriate tax documentation for your records.

Please note that the date of your gift is the day on which the security is transferred to the APU account, NOT the date you authorize the transfer to occur.

For more information, please contact Ann M. Hale, CFRE, at (907) 564-8346, ahale@alaskapacific.edu