



Gifts of Stocks and Securities

Roger Williams University welcomes gifts of stock, securities, and other appreciated assets. These gifts may allow for the avoidance of capital gains taxes and provide a charitable deduction for the full fair market value of the donation.

Instructions for Stock Transfers

To initiate a transfer of stock or securities held by a brokerage firm or commercial bank, please notify your broker or bank that you intend to transfer securities to Roger Williams University. This can often be done online. Your broker or bank will need the information below to complete this transaction.

Brokerage Name: US Bank NA
For the Benefit of: Roger Williams University
Account #: 001050986833
Broker DTC #: 2803
EIN #: 05-0277222

Important Instructions for Donors

Please also notify RWU about your gift. The information below will help us to track your gift and thank you as soon as possible.

- Company Name
- Number of Shares
- Approximate Value
- Gift designation

Notification or questions may be directed to:

Angela Pizzolato, Senior Director of Advancement and Donor Services
apizzolato@rwu.edu
401-254-5480

Additional Tips

Stock Valuation for Donors: The delivery method of your stock gift determines the deductible value for IRS tax purposes. Please consult with your tax advisor. We are happy to confirm your stock donation, reflecting the name of the security and number of shares. Your tax advisor will help you calculate the deductible value.

Stock Valuation for Roger Williams University: RWU determines the value of your stock gift for funding and recognition purposes according to IRS and accounting guidelines.