

Gifts of Stock

Outright gifts of securities (stocks, bonds, and mutual funds) provide Chatfield with much-needed financial assistance. Gifts of appreciated securities provide the donor with an income tax charitable deduction and capital gains tax savings.

There are several ways to transfer securities to Chatfield: electronic transfer, mail delivery, or hand delivery. **It is strongly recommended that for each gift of stock you notify the Development Office by email, mail or by phone.**

Electronic Transfer: Notify your broker that you wish to make a gift of stock to Chatfield. Provide your broker with the following information:

DTC Eligible Securities:

M & I Bank Participant #992

Agent ID: M&I Affirms 11152

Advisor Affirms 94298

Institutional #44681

Further Credit To: National Bank & Trust Acct #74-1016-018

Additional Credit to Chatfield College Account # 61-1322-009

NBT Representative: Ginger Valentine
937-283-3058

GValentine@NBTDIRECT.COM

Mail: Send the unsigned certificates to the Development Office by registered mail. In a separate envelope, send a signed stock power to the Development Office again by registered mail. A stock power is available from your broker or bank. Please do not mail endorsed certificates! Once the certificate is endorsed, it is legal tender and can be exchanged by anyone.

Hand Delivery: Stock certificates may be given to a Development Office staff member or delivered in person to the Development Office. Bonds and mutual funds can easily be given as gifts to Chatfield. Please contact the Development Office for more information.