**Otis College of Art and Design**

**Gifts of stock** are a great way for an individual to avoid financial implications from capital gains tax. You can make a gift of stock to Otis College of Art and Design. We have compiled information on 2 primary ways of making a gift of stock to Otis:

Appreciated Stock—By making a gift of appreciated stock (that you have owned for at least one year); or

Depreciated Stock—Typically it is to your advantage to sell depreciated stock and realize the loss as an allowable deduction on your federal taxes. You can then donate the cash proceeds, which becomes a charitable deduction.

In all cases of making gifts of stock/securities, we encourage you to consult a tax professional to fully understand the tax implications.

To make a gift of stock (electronically), please contact our stockbroker at:
UBS Financial Services
Attention: Connie Lambert
1200 Prospect Street, Suite 500
La Jolla, CA 92037-2268
Phone: (858) 551-9401
DTC ID #221
All gifts should be assigned to Account # VR 23743-34

To make a gift of stock (physical delivery), please contact our stockbroker at:
UBS Financial Services
Attention: Connie Lambert
1200 Prospect Street, Suite 500
La Jolla, CA 92037-2268
Phone: (858) 551-9401 DTC ID #221
All gifts should be assigned to Account # VR 23743-34

Regardless of the method of transfer, please notify Kristi Bieber, Director of Development, of the gift transfer. Additionally, in order to acknowledge your gift properly, please include the name of the stock being transferred. You may call (310) 665-6859 or email her at kbieber@otis.edu. You may also fax your intent to (310) 665-6955 or send the correspondence to:

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Institutional Advancement Office
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