



## **Supporting Chi Phi with a Gift of Appreciated Securities**

Donating appreciated securities to the Chi Phi Educational Trust is a smart and simple way to help advance our Brotherhood. By making a gift of appreciated securities, you have an opportunity to avoid paying capital gains tax on the increase in the stock's value. Donors also typically receive a tax deduction for the full fair market value of the stock on the date of the gift.

Individuals wishing to donate stock to the Chi Phi Educational Trust, a 501(c)(3) educational foundation, can do so using the following procedures:

### **Transfer the Appreciated Securities To:**

UBS Financial Services  
DTCC #0221  
Acct #: 2H 00119 Q3  
Acct Name: Chi Phi Educational Trust Endowment Fund

For additional assistance, contact Stephanie Doane, our UBS Representative, at 317.816.1833. She is available to help answer any questions you might have and can help facilitate the transfers.

### **The Federal Identification Number of the Educational Trust:**

58-6035103 N

### **Notify Chi Phi**

Once you transfer the appreciated securities, please contact the Executive Director of the Educational Trust at 404.231.1824 or [landry@chphi.org](mailto:landry@chphi.org) with the following information:

- Your Name
- The amount and name(s) of the shares you transferred
- The date of the transfer
- Any particular fund, if any, you want the gift to support

It is very important that you notify Chi Phi with this information so that you receive proper credit and a charitable gift receipt for your generous gift.