

Giving publicly traded securities is one of the easiest and most tax-savvy ways to support Northeast Ohio Medical University. When you donate long-term appreciated securities, you can take a charitable deduction for the stock's fair market value on the day you give it away. In addition, you avoid paying capital-gains tax.

Benefits

- Save on capital-gains taxes when your securities have increased in value.
- Receive an immediate income-tax deduction.
- Complete the gift by electronic transfer.

How do I make a gift of stock/publicly traded securities?

The Northeast Ohio Medical University Foundation (NEOMED Foundation) works with Fidelity Investments for all stock transactions. Below are account and DTC numbers for your use in making a gift of stock to the NEOMED Foundation.

1. Provide written instructions to your bank or broker.

For example: Per our recent telephone conversation, I wish to make an irrevocable gift to the NEOMED Foundation of "x" shares of "xyz corporation". Please make the transfer to Northeast Ohio Medical University via DTC as follows:

Fidelity Investments Account Information

- Client: NEOMED Foundation
- Agency: Fidelity Investments
- Account: 645-585652
- DTC#: 0226

- ### 2. To avoid unidentified gifts, please immediately notify NEOMED of the stock gift.
- Include the name of the stock, the stock symbol and the number of shares to be transferred. When shares are transferred from your account into NEOMED's account, your name DOES NOT APPEAR on the transfer report. Therefore, we have no record of who donated the stock. PLEASE send this vital information by email or fax to one of the addresses listed below:

EMAIL: philanthropy@neomed.edu
PHONE: 330.325.6662
FAX: 330.325.5923
ATTENTION: Advancement Services/NEOMED Foundation

- ### 3. Please indicate the purpose of your gift (Blue Fund, scholarship or other designation).

CONTACT US

Contact the Division of Advancement to speak with a member of the development team about gifts of stock and appreciated securities to the NEOMED Foundation. We would be happy to help you or answer any questions you or your advisors may have.

330.325.6662 | philanthropy@neomed.edu