

## **Transferring Stock to Concordia College**

Making a stock gift is an easy and tax-wise way to make a donation to Concordia College. A gift of appreciated securities saves taxes twice. You may receive an income tax deduction for the full market value of the donated shares if you've held the securities for more than one year, and you may avoid capital gains tax on the appreciation.

If you have your shares of stock in a brokerage account, you will need to provide your broker with the following information:

**Carl Wall**  
**Merrill Lynch**  
**For the account of Concordia College: (please contact our office**  
**The DTC Number is: to obtain this information)**  
**Concordia College's Tax ID is:**

**51 Broadway**  
**Fargo ND 58102**

**Phone: (800) 937-0614**

It is **critical** that when making a gift of stock that you alert Concordia in advance, so that the gift will be properly credited when received. To advise of an anticipated stock gift, please send a fax, letter, or e-mail to the Advancement Office with the following information:

- Your name
- Name of the stock gifted
- Number of shares
- Designation of the gift
- Approximate date of expected gift

Please send this information to:

*Carol Eid Fliss, Director of Development Services*  
*Advancement Office*  
*Concordia College*  
*901 8<sup>th</sup> Street South*  
*Moorhead MN 56562*  
*Phone: (800) 699-9896*  
*Fax: (218) 299-4560*  
*Email: fliss@cord.edu*