

GIFTS OF APPRECIATED SECURITIES

To Bard College

When you donate appreciated stocks to Bard, you avoid the capital gains tax you would have paid if you sold the asset. If you have owned the securities for longer than twelve months, you also receive an income tax charitable deduction for their full fair-market value. These tax savings – both in income and capital gains taxes – make gifts of securities a popular alternative to cash.

If you wish to maintain a particular stock in your portfolio, consider giving Bard the stock and using the cash you would have donated to purchase the same securities in the open market. The newly acquired shares will then carry the current market value as their cost basis, an easy way to reduce future capital gains tax liability.

To make a gift of stock please instruct your broker or bank officer to arrange for the transfer of securities electronically to Bard's account at UBS Financial Services Inc.

The information is as follows:

UBS Financial Services Inc.
DTC number: 0221
Beneficiary: Bard College
Account number: US11008
Memo: (purpose of gift)

Please include the name of Securities and number of shares.

In order to ensure proper crediting of your gift...

You must email, fax or mail a copy of the instructions you send to your broker or bank officer along with any special instructions regarding the purpose of the gift to Bard College. Our broker is unable to provide us with donor information.

Email: giftrecorder@bard.edu
Fax: 845-758-4294

Bard College
Attn: Gift Recorder
Office of Development
PO Box 5000
Annandale-on-Hudson, NY 12504-5000.

Please contact our Gift Recorder at (845) 758-7861, or by email to giftrecorder@bard.edu or Robert Laity at (845) 758-7315, email at laity@bard.edu in the Office of Development if you have any questions.

Do not send Certificates to UBS.

If you hold stock certificates, please send them by mail to Bard College, or deliver by hand, unendorsed, with a cover letter describing the asset(s) being donated and the purpose of the gift to Bard College, Attn: Gift Recorder, PO Box 5000, Annandale-on-Hudson, NY 12504-5000. In a separate envelope, send a signed (exactly as the name appears on the certificate) stock/bond power for each asset to the same address. Do not complete any other section of the stock/bond power.