



Supporting Chi Phi with a Gift of Stock

Contributing stock and other securities provides donors with an opportunity to avoid paying capital gains 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:



1. Transfer the stock to:

Sanford C. Bernstein & Co., LLC

DTC#: 013

Acct#: 03907906

Acct Name: Chi Phi Educational Trust Endowment Fund

** Note, Chi Phi is unable to accept transfers of open-ended mutual funds (tickers usually end in "X")*



2. Notify Chi Phi

Once you transfer the stock, please contact the Chi Phi Development Office at (800) 849-1824 or fax: (404) 237-5090 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 stock 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.



For More Information:

Fred Maglione - maglione@chiphi.org - (800) 849-1824

Elizabeth Knott - knott@chiphi.org - (800) 849-1824

make a cash gift online at www.chiphi.org