

Otis College of Art and Design

Gifts of stock are a great way for an individual to avoid financial implications from capital gains tax. You can make a gift of stock to Otis College of Art and Design. We have compiled information on 2 primary ways of making a gift of stock to Otis:

Appreciated Stock—By making a gift of appreciated stock (that you have owned for at least one year); or

Depreciated Stock—Typically it is to your advantage to sell depreciated stock and realize the loss as an allowable deduction on your federal taxes. You can then donate the cash proceeds, which becomes a charitable deduction.

In all cases of making gifts of stock/securities, we encourage you to consult a tax professional to fully understand the tax implications.

To make a gift of stock (electronically), please contact our stockbroker at:

UBS Financial Services

Attention: Connie Lambert

1200 Prospect Street, Suite 500

La Jolla, CA 92037-2268

Phone: (858) 551-9401

DTC ID #221

Unrestricted and restricted (non-endowment) gifts should be assigned to Account # VR 23741-34.

Endowment Gifts should be assigned to Account # VR 23743-34.

To make a gift of stock (physical delivery), please contact our stockbroker at:

UBS Financial Services

Attention: Connie Lambert

1200 Prospect Street, Suite 500

La Jolla, CA 92037-2268

Phone: (858) 551-9401 DTC ID #221

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Endowment Gifts should be assigned to Account # VR 23743-34.

Regardless of the method of transfer, please notify Andre Khachtourians, Annual Giving Manager, of the gift transfer. Additionally, in order to acknowledge your gift properly, please include the name of the stock being transferred. You may call (310) 665-6869 or email him at akhachtourians@otis.edu. You may also fax your intent to (310) 665-6955 or send the correspondence to:

Otis College of Art and Design

Institutional Advancement Office

1700 East Walnut Avenue, Suite 650

El Segundo, CA 90245