

York College of Pennsylvania accepts gifts of stock, bonds, and mutual fund holdings, among other assets. Donors may transfer marketable directly to York College or sell the asset and gift the proceeds of the sale. We advise donors to consult their financial advisors to determine which method provides the most favorable tax consequences. *In most cases pertaining to appreciated assets, the donor will achieve more favorable tax results by transferring the asset directly to YCP before selling.*

**Electronic Transfer of Stock**

Stack transfers should be made to York College of Pennsylvania’s account at Janney Montgomery Scott as follows:

Mr. David Brosend

Janney Montgomery Scott

2315 N Susquehanna Trail Stuit A

York, PA 17404

Phone: 717-779-2732

Email: dbrosend@janney.com

Acct. #8891-3125

DTC #0374

York College Tax ID #23-1352698

It is important to instruct the broker in writing to transfer the stock into the York College of Pennsylvania account. ***Please send the Advancement Office a copy of your instructions to the broker and your intentions for the use of the gift by York College.***

**Certificate Transfer of Stock**

Draft a letter detailing the gift and your intention for its use by York College. Sign this letter and the back of the stock certificate (leaving all other stock certificate fields blank) in the presence of a bank officer who can guarantee the signatures. Hand deliver the letter and stock certificates to the address listed at the bottom of this page. If you need to mail the certificate, do so unsigned. Under separate cover, sign a blank stock power and post each document to the Advancement Office (contact information below).

**Mutual Funds**

Please contact the Advancement Office directly for mutual fund transfer instructions.

**Account and Receipting**

Marketable securities are valued at the average of the high and low quoted selling prices on the date the donor relinquished dominion and control of the asset in favor of York College. Neither losses nor gains realized by York College’s sale of the securities after their receipt, nor brokerage fees or other expenses associated with this transaction, should affect the value reported. Gifts of mutual funds are valued using the closing net asset value (NAV) on the date the asset is transferred to York College. Please note that, per current policy, York College will promptly sell securities upon receipts.

**Contact Information:**

Mailing Address: York College of Pennsylvania Physical Address: Grantley Hall, Room 126

Advancement Office of Gift Planning 850 Grantley Road

441 Country Club Rd York, PA 17403

York, PA 17403

Phone: 717-815-1410

Email: skane1@ycp.edu