



Post Office Box 690
Chapel Hill, North Carolina
27514-0690

MAKING A GIFT OF STOCK

In addition to the income tax benefit that comes from a gift to the Morehead-Cain Scholarship Fund, donors enjoy another tax advantage if they use appreciated stock — the capital gain tax on the appreciation in market value is essentially waived.

Most donors have their investments held in electronic form with a brokerage house. Making a gift of stock from such an account is easy. Just instruct your broker to transfer the shares to UNC for the benefit of the Morehead-Cain Scholarship Fund. The University's brokerage account is set up with Wachovia:

ACCOUNT TITLE: UNC-Chapel Hill

ACCOUNT #: 89994225

DTC #: 0141

CONTACT PERSON: Ken Wiles

PHONE: 1-800-642-0847

Please contact emily_oliver@unc.edu at the Morehead-Cain Foundation and tina_zimmerman@unc.edu in the UNC Development Office to let us know that your gift is in process. Very often, the shares are transferred into the UNC account without information that indicates the donor's name. The phone call will allow us to match your name with the correct stock gift.

We'll use the date that the shares enter UNC's account as your gift date and credit you with the average market value on that date.

If the shares that you would like to transfer are in the form of certificates, please contact Emily Oliver at 1-800-741-9023 or emily_oliver@unc.edu to receive more detailed instructions on transferring such assets.

Thank you!