

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 RBC Wealth Management.

The information is as follows:

RBC Wealth Management
DTC number: 0235
Beneficiary: Bard College
Account number: 328-69000
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

Mail:

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.