

## Stock Letter Sample

May 28, 2015

Mr. and Mrs. John Doe  
123 Main Street  
Tampa, FL 33620

Dear Mr. and Mrs. Doe:

Thank you for your gift of 500 shares of General Corporation which we have valued for our internal purposes at \$15,000.00 as of May 5, 2015. For tax purposes, you will want to seek guidance from a tax professional in determining your deductible amount.

We know that achieving excellence is a collaborative effort, and recognize that the growth and success of the University of South Florida System has been greatly aided by our friends and supporters. We are extremely grateful you have chosen to be a part of this effort. Together we truly can affect change and make a real difference to the lives of so many.

In recognition of your support, the University of South Florida Foundation may list your name in print or online publications. Your name would appear as John and Jane Doe. If you do not want your name to appear as a donor or prefer it to appear differently, please contact the Office of Donor Relations & Stewardship at (813) 974-2035 or [donorrelations@usf.edu](mailto:donorrelations@usf.edu).

Thank you once again for your dedication to this great university.

Sincerely,

Kaley M. Peters  
Director of Donor Relations & Stewardship

August 7, 2015

Donor Name  
Address  
City, State Zip

Dear Donor:

Thank you for your gift of 88 shares of Madison Mayweather (MMC) stock, designated to Elon College, the College of Arts and Sciences. The value established for your stock gift, received on August 3, 2015, is \$4,925.36. This value is based on the mean between the highest and lowest selling price on that date, which was \$55.97 per share.

Elon College, the College of Arts and Sciences, is a national model for excellence and innovation in undergraduate education, offering students the unique opportunities that have made Elon the preeminent university for global engaged learning. Your contribution is a meaningful investment in the next generation of leaders and a better society. Thank you again for your generous support.

Sincerely,

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Assistant Vice President of University Advancement

*This letter is your gift receipt for tax purposes. Since no goods or services of any value have been provided in return for this gift, the full amount is a tax-deductible contribution.*

August 7, 2015

Mr. and Mrs. Donor Name  
Address  
City, State Zip

Dear Mr. and Mrs. Donor:

Thank you for your gift to Elon University of the following shares of stock, received on Monday, August 3, 2015:

	Mean Value per Share (between highest and lowest selling price on date received)	Gift Value
850 shares of Cisco Systems, Inc. (CSCO) stock	\$ 28.35	\$24,097.50
60 shares of Accenture, PLC (ACN) stock	\$103.09	\$ 6,185.40
2500 shares of Sirius XM Holdings Inc. (SIRI) stock	\$ 3.98	\$ 9,950.00
	<b>Total Gift Value</b>	<b>\$40,232.90</b>

This gift has been designated to Elon's greatest needs, an important source of scholarship aid for us. It will help us provide students with the rich and challenging experiences that are the hallmark of an Elon education: outstanding academic interactions, leadership training, and service opportunities. Experiences like these will transform their lives and the communities in which they live and work. There is no more meaningful gift.

Sincerely,

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Assistant Vice President of University Advancement

*This letter is your gift receipt for tax purposes. Since no goods or services of any value have been provided in return for this gift, the full amount is a tax-deductible contribution.*

September 02, 2015

«mail\_label\_name»  
«care\_of»  
«street1»  
«street2»  
«street3»  
«city», «state\_code» «zipcode»  
«foreign\_cityzip»  
«country»

Dear «mail\_salutation\_name»:

Thank you for your recent gift of the (number of shares) of (Stock description) in support of the (Fund) at the (School).

Your recent gift reflects the generosity that allows UH students to experience success because of quality academic programs, prominent faculty, and a dynamic educational environment. Your dedication and commitment are greatly appreciated.

This letter shall serve as your receipt and acknowledgement for the (number of shares) of (Stock description) which were received by the Foundation on (Date given). In that regard, I verify that nothing was provided to you by the Foundation or the University in return for your gift.

On that date, (Stock description) traded at a high of \$high and a low of \$low for an average price per share of \$average. Please remember these values are for Foundation's valuation purposes only, if you wish to claim your gift as a charitable deduction, you must obtain your own valuation. Please consult with your tax advisor for more information. You and your tax advisor may find the enclosed copy of the IRS form 8283 and instructions helpful in this regard.

If you have questions, please contact Terri Alvaro, Director of Donor Relations, at (808) 956-8874 or Terri.Alvaro@UHFoundation.org.

Thank you for your support in helping us advance our University, our Hawai'i, our Future.

Sincerely,

Donna Vuchinich  
President & CEO

enclosures



DATE

Donor Name  
Address 1  
Address 2  
City State Zip

Dear Donor:

Thank you for your recent gift of stock in support of the FUND NAME at the Timothy Alden Council level. On DATE OF GIFT we received \_\_\_ shares of NAME OF STOCK common stock. On the date of receipt, this stock traded at a high of \$\_\_\_\_\_, a low of \$\_\_\_\_\_, and a median of \$\_\_\_\_\_. *You and your tax accountant may find this information helpful in case you wish to claim your gift as a charitable deduction on your federal income tax. This letter serves as documentation that no goods or services were provided to you, the donors, as a result of this gift.*

Comment [n1]: TAC

Through your own experience, you know that the College seeks to teach students how to think critically and creatively, write clearly, speak persuasively, and meet the challenges of a diverse, interconnected world. Many of your fellow alumni agree that an Allegheny education is much more than just a degree, and the overall experience stretches far beyond a typical liberal arts education. Gifts from alumni like you support Allegheny's mission, helping to prepare young adults for successful, meaningful lives.

Comment [RDS2]: Alumni

Many parents know and appreciate Allegheny's mission, which is to teach students how to think critically and creatively, write clearly, speak persuasively, and meet the challenges of a diverse, interconnected world. Alumni say that an Allegheny education is much more than just a degree, and the overall experience stretches far beyond a typical liberal arts education. Gifts from parents like you support Allegheny's mission, helping to prepare young adults for successful, meaningful lives.

Comment [RDS3]: Parents

As a friend of the College, you appreciate that Allegheny seeks to teach students how to think critically and creatively, write clearly, speak persuasively, and meet the challenges of a diverse, interconnected world. Friends and alumni agree that an Allegheny education is much more than just a degree, and the overall experience stretches far beyond a typical liberal arts education. Gifts from friends like you support Allegheny's mission, helping to prepare young adults for successful, meaningful lives.

Comment [RDS4]: Friends

As an employee, you see directly the impact your gift has on our students. Allegheny seeks to teach students how to think critically and creatively, write clearly, speak persuasively, and meet the challenges of a diverse, interconnected world. Employees agree that an Allegheny education is much

more than just a degree, and the overall experience stretches far beyond a typical liberal arts education. Gifts from employees like you support Allegheny's mission, helping to prepare young adults for successful, meaningful lives.

**Comment [RDS5]:** Employees

Your generosity will help secure forever Allegheny's rightful place as one of the great liberal arts colleges in the history of the nation. Thank you again for investing in Allegheny and for being a part of Our Allegheny: our Third Century Quest comprehensive campaign. If you would like to follow the progress of the campaign, you can do so at [www.allegheny.edu/campaign](http://www.allegheny.edu/campaign).

Sincerely,

Lisa Young  
Director for Donor Relations

August 13, 2015



Dear [REDACTED] and [REDACTED]:

On behalf of the entire Doane College community, thank you for your generous gift of 30.0 shares of Telus Corporation. Your donation will support the Doane Fund.

Doane College remains dedicated to offering the best liberal arts education and graduating students who are committed to making a difference in their professions and communities. Your gift will have a direct impact on our ability to bring together the most promising students and faculty and sustaining an environment that increases academic innovation and advances our global reputation.

We appreciate your contribution and the many opportunities it brings to the promise and potential of the students and the Doane College community. Thank you.

Sincerely,



Vice President for Advancement

Your Tax Receipt

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Credit Date: 06/29/15  
Description: Stock Telus Corporation (TU) Date 6/26/2015 Shares 30 High 34.97; Low 34.59; Avg. 34.78.  
Designation: Doane Fund



Doane College  
1014 Boswell Ave Crete, NE 68333  
Toll Free: 800-333-6263  
[www.Doane.edu](http://www.Doane.edu)

No goods or services were received in exchange for this contribution unless specifically noted above. Doane College is a 501(c)(3) not-for profit organization. Federal Tax I.D. No.47-0377991. US Donors, please retain this receipt for your tax records. Donations to Doane College are deductible for income tax purposes as provided by law; please check with your tax advisor for specific deduction information. For gift-in-kind donations, it is the donor's responsibility to describe and assign value to donated items.

Date

Address Block

Salutation,

I write with my sincerest thanks for your generous gift of [#] shares of [name of stock] stock to First Book on [date]. Based on details provided by your financial representative, this gift was valued at [\$\_\_\_\_\_].

Your gift sends a message to the children we serve that people care about their future. With your help, First Book can provide the essential resource every child needs to succeed in school, and in life—brand new, high-quality books.

I wish you could be there when the books are handed to the kids. They jump up and down with excitement. Their eyes light up. They can't wait to start reading. New books spark their imaginations, feed their growing and developing minds, and bring joy and comfort. So many of the children we serve have no books to call their own. Your gift is an investment in their lives.

To learn even more about First Book and how you can continue to inspire children, visit [www.firstbook.org](http://www.firstbook.org) to sign up for e-news or volunteer with First Book.

I am grateful that you keep these children close to your heart.

With thanks from all of our young readers,

Kyle Zimmer  
President and CEO

*This letter confirms that no goods or services were provided to you in exchange for your contribution, and that your gift is tax-deductible to the extent allowable by law. First Book is a 501(c)3 nonprofit organization. Our federal tax ID is 52-1779606.*