



How to Donate Stocks and Securities to Princeton in Africa

1.) Securities held by your broker

Please instruct your broker to wire transfer the gift to:

Wells Fargo Advisors Solutions
1 North Jefferson Ave.
St. Louis, MO 63103
MAC H0004-014
(866) 636-8339
Account Name: PRINCETON IN AFRICA, INC.
Account Number: 2363-2805
DTC Number: 0141

*Delivery instructions MUST include the DONOR'S NAME and Princeton in Africa's name as recipient.

2.) Stock certificates in your possession

1. Please send stock certificates to Princeton in Africa along with a signed Stock Power; OR
2. Please mail the stock certificates, Stock Power, and instructions in separate envelopes to Wells Fargo; OR
3. Please personally deliver the stock certificates to Wells Fargo along with instructions regarding transfer of ownership to Princeton in Africa.

Important: the stock certificates should NOT be endorsed. In addition, please do not fill out the Stock Power, but only sign with your name EXACTLY as it appears on the stock certificate.

3.) Mutual Funds

Please contact Wells Fargo directly at 1-866-636-8339

*To ensure that you receive a receipt for your donation and recognition in our materials, please contact Princeton in Africa by phone or email to identify yourself, your gift, and contact information.

Thank You for Your Donation!

Frequently Asked Questions

PLEASE NOTE – FAQs are provided as general guidance and are based on the best knowledge available to Princeton in Africa.

It is important that you speak with your financial advisor to discuss your personal situation and for the most up-to-date information on stock and security donations.

Q: Why should I donate APPRECIATED SECURITIES (stocks, bonds, mutual funds) rather than cash?

A: It is ALWAYS more economically beneficial to you! When you donate APPRECIATED SECURITIES to Princeton in Africa, we sell them. NO capital gains taxes have to be paid; you may deduct the full market value of securities donated

Q: What about securities that I want to keep?

A: It is actually more beneficial to you to donate securities that have appreciated the most. Instead of cash, donate the securities and use the cash to repurchase the securities. By doing so, you get what is called a “stepped-up cost basis” and you, in effect, still avoid the tax on the appreciation – and still keep the securities!

Q: What about DEPRECIATED SECURITIES? Is it advantageous for me to donate them as well?

A: No. If you have securities that have depreciated in value, it is best for you to sell them – thereby creating a tax loss – and then donate the proceeds.

Q: Does it matter how long I have owned the securities?

A: You must have owned the securities for at least ONE YEAR to be credited with the appreciation. The donation value of securities you have owned for less than one year is limited to the amount you paid for them, or its current value, whichever is LESS.

Q: Do I need to notify Princeton in Africa when I donate securities?

A: Always – especially if your donation is made through your broker. Your notification allows us to properly credit you for your gift and to give you a timely receipt for your donation. Please call us at (609)258-7215 or email us at piaf@princetoninafrica.org

Q: How is the donated value of my gift calculated?

A: The gift value of the securities is the average of the high and low prices on the day:

1. The securities are placed in an account in the name of Princeton in Africa; OR
2. The securities and Stock Powers are hand delivered or mailed (date of postmark) in negotiable form to Princeton in Africa or its agent.

DTC wire transfers by brokers are completed ONLY when the stocks are placed in a Princeton in Africa account. Simply giving your broker transfer instructions will not insure a timely transfer; therefore, please stay in touch with your broker to insure delivery on a day that you have chosen.

Thank you for you for considering a stock gift to Princeton in Africa!