

MAKE A GIFT. MAKE AN IMPACT.



WAYS TO GIVE TO URSINUS COLLEGE TODAY

Thank you for your consideration of a philanthropic investment in Ursinus College. We are grateful for your partnership and are happy to work with you and your advisors to structure a gift in the manner that best meets your philanthropic and financial goals.

GIVE BY CHECK

Please make checks payable to:

Ursinus College
Office of Advancement
601 E. Main Street
Collegeville, PA 19426

GIVE ONLINE

Make a secure gift online at:

ursinus.edu/giving

You may designate your gift to the Ursinus Fund, APEX at Ursinus, scholarships, athletics, academic programs, or another area of interest.

GIFTS OF APPRECIATED SECURITIES

Many donors choose to make gifts of appreciated stocks, bonds, or mutual funds, which may provide significant tax advantages while maximizing the impact of their philanthropy.

Gifts of stock are welcomed at Ursinus. Notify your broker to wire transfer your stock gift to:

Morgan Stanley Smith Barney
DTC #0015
FBO: Ursinus College
Account: #672-027549

We ask that all donors who make a gift of securities please notify our office of plans to do so, with the information below, so that we can look out for your gift and process your donation promptly:

Information Requested for Gifts of Securities

Your Name
Date of Transfer
Type of Securities
of Shares
Gift designation

QUESTIONS OR ASSISTANCE?

John Bernat, Associate Vice President
610-291-9294 | jbernata@ursinus.edu

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WIRE TRANSFERS

Gifts may be made via electronic funds transfer or wire transfer.

Wire transfers and ACH transfers are safe, secure methods for making your gift. For accurate and timely processing of transactions, it is very important that remitters correctly identify the company account number and the applicable information.

To send a wire transfer, please provide this information to your bank or brokerage:

For Wire or ACH Transfers:

Ursinus College

Account number 721779059

Bank Routing Number: 021000021

Bank Address: JP Morgan Chase, 383 Madison Avenue, New York, NY 10179

We ask that all donors who make a gift via a wire transfer or ACH to please notify our office of your plans, along with the following information before you make your transfer so we can watch for your gift, process your donation promptly, and provide proper acknowledgement:

Your Name

Date of Gift

Amount

Gift Designation

GIFT PLANNING

When you include Ursinus in your estate plan, your generosity helps give the College flexibility and confidence to plan for the future, supporting lasting investments that benefit generations of students. Gifts can help with priorities such as student scholarships, academic excellence, and faculty support.

There are many ways that you can benefit Ursinus College through charitable gift planning. You can name the college as a beneficiary in your will or living trust, or consider a charitable gift annuity or charitable trust, or give directly from your IRA through a qualified charitable distribution (for those 70 ½ year old).

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DONOR-ADVISED FUNDS (DAFs)

Donor-advised funds (DAFs) provide immediate tax benefits to benefactors while also offering an easy, convenient way to direct charitable giving. You may make a contribution to Ursinus from your DAF via two avenues:

- Recommend that a grant be distributed from your DAF to Ursinus College.
- Designate Ursinus College to receive all or a portion of the value of your DAF upon the termination of the fund.

To initiate a grant or to designate Ursinus as a beneficiary of your DAF, please reach out to your fund administrator. You may provide them with the following information:

Legal Name: Ursinus College

Address: 601 E. Main Street, Collegeville, Pa. 19426

Federal Tax ID Number: 23-1177930

Legal Name: Ursinus College

Tax ID: 23-1177930

MAKE A MULTI-YEAR PLEDGE OR RECURRING GIFTS

Make an impact at Ursinus now, and into the future, through a multi-year pledge. Pledges can span up to five years and support several priorities at the college.

Recurring gifts is an easy way to make an impact that works for your budget and schedule. Gifts can be made on a monthly, quarterly, or annual basis.

To discuss a pledge commitment please contact us and one of our staff members will work with you in person to structure the gift according to the impact you would like to have.

MATCHING GIFTS

You may be able to maximize the impact of your charitable giving if your employer supports a matching gift program. Some companies match employees giving at a rate of 1:1, 2:1 or even 3:1! Moreover, others will match contributions made by spouses or even retirees.

Our staff can help you determine if your company is a participating employer.

QUESTIONS OR ASSISTANCE?

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