



Stock Gifts

Thank you for considering a gift of stock to Waldorf University.

Donating appreciated securities* is an excellent way to show your support for Waldorf. It may also provide you with significant tax benefits. The information below will help you learn more about how you can make a gift of stock.

As you consider a gift of stock, please remember to let us know when and how we can expect to receive your donation. foundation@waldorf.edu

Waldorf's broker is Matt Twedt. Gift of Stock can be transferred directly to Waldorf through our Charles Schwab account at:

Charles Schwab

DTC# 0164

Account Number: 4203-8859

Account Name: Waldorf Lutheran College Foundation, INC.

Please send a copy of the instructions you sent to the broker to the attention of Matt Twedt at matt.twedt@intelligents.com, **and** Ms. Severin Roberts, Waldorf V.P. for Engagement & Advancement at foundation@waldorf.edu.

Questions? You may also contact Ms. Severin Roberts at 800-292-1903, or during Waldorf holiday closure (12/23/25-1/1/26) at her cell 515-460-1765.

Stock gifts arrive in our broker accounts **without** a donor name attached. Please email the donor's name, type of stock and shares to assure accurate gift credit in your name.

Matt Twedt | CFP® · CLTC®

President

matt.twedt@intelligents.com

direct 507.379.6910 (text) - **office** 800.880.4015

100 N Broadway Ave

Albert Lea, MN 56007

*Don't transfer securities that have depreciated in value. The fair market value deduction rule works against you: if you bought stock for \$50,000 and it's now worth \$30,000, your charitable deduction will be limited to \$30,000. You won't earn a capital loss by making the transfer. Instead, sell the depreciated stock, claim the resulting tax loss as a single deduction, and then use the proceeds to make a potential tax-deductible cash gift to Waldorf.