Tips for Easy Year-End Giving - 2017

As 2017 comes to a close, we invite you to make a year end, tax-deductible gift to the college in support of our students and faculty.

To Make an Online Gift
Visit our secure donation website: giving.cwru.edu/casgiving

To Make a Gift by Mail
Send gifts to:
Case Western Reserve University
Advancement Services
10900 Euclid Avenue
Cleveland, OH 44106-7035

To Make an Outright Gift or Transfer of Stocks, Bonds and Mutual Funds
If the donor holds no share certificates, in order to be counted in the 2017 tax year, stocks, bonds, mutual funds must be transferred out of donor’s account no later than December 31, 2017. If the donor does hold share certificates, put the certificates in one envelope and signed stock powers in a 2nd envelope and mail to:

Tony Fatica
Office of the Treasurer
Case Western Reserve University
10900 Euclid Avenue
Cleveland, Ohio 44106-7016
(216) 368-3253
anthony.fatica@case.edu

To Make a Planned Gift of Stocks, Bonds and Mutual Funds
If the donor holds no share certificates, in order to be counted in the 2017 tax year, stocks, bonds, mutual funds must be transferred out of donor’s account no later than December 31, 2017. If the donor does hold share certificates, put the certificates in one envelope and signed stock powers in a 2nd envelope and mail to:

John Shelley
Office of Gift Planning
Case Western Reserve University
10900 Euclid Avenue
Cleveland, Ohio 44106-7091
(216) 368-3733
john.shelley@case.edu
If gift is a STOCK, BOND, or EXCHANGE TRADED FUND (ETF)
Gift Account Name: Case Western Reserve University
CWRU Brokerage Firm: Vanguard Brokerage Services
CWRU Brokerage Gift Account: 26004508
DTC Number: 0062
University Tax ID: 34-10189922

If gift is a NON-VANGUARD MUTUAL FUND
Gift Account Name: Case Western Reserve University
CWRU Brokerage Firm: Vanguard Brokerage Services
CWRU Brokerage Gift Account: 26004508
DTC Number: 0062
University Tax ID: 34-101899

If gift is a VANGUARD MUTUAL FUND
Gift Account Name: Case Western Reserve University
CWRU Brokerage Firm: The Vanguard Group
CWRU Vanguard Mutual Fund Gift Account: 88005973785
University Tax ID: 34-1018992

Vanguard Address:
The Vanguard Group
455 Devon Park Drive
Wayne, PA 19087-1815

For Questions:

Tony Fatica
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Cleveland, Ohio 44106-7016
(216) 368-3253
(800) 315-3863
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