

# Donating Gifts of Stock

UNIVERSITY ADVANCEMENT



There are several ways to transfer securities to St. Edward's: electronic transfer, mailing certificates, or hand delivery.

## ELECTRONIC TRANSFER

The most popular and most efficient way to transfer securities to St. Edward's is by electronic transfer.

**If your stock is held at a broker, notify the broker** that you wish to make a gift of securities to St. Edward's University. Your broker will need written authorization from you before they can make the transfer. Be sure to tell them the name of the stock that you want to transfer, the number of shares, and where you would like your gift to be designated when it reaches St. Edward's. A St. Edward's stock transmittal form (available on the next page) can be used in place of a letter. Please mail or fax a copy of your authorization letter or the stock transmittal form to the following address:

Cheri Sullivan, Director of Advancement Services  
St. Edward's University  
University Advancement  
3001 South Congress Avenue  
Austin, Texas 78704  
Fax: (512) 416-5845

## MAILING STOCK CERTIFICATES

If your securities are not held at a broker then you can either mail or hand deliver the certificates directly to the Office of University Advancement. If mailing, send your unendorsed certificate(s) and a cover letter (including your name, address, and purpose of the gift) in one envelope. In a second envelope, send a signed, signature guaranteed, stock power. We strongly recommend using registered mail to forward your certificates and stock power. A stock power form can be obtained at your local bank or by calling University Advancement at (800) 964-7833 or (512) 448-8430.

## HAND DELIVERY

Certificates may be given to a University Advancement Officer or delivered to the Office of University Advancement.

**NOTE:** Please DO NOT mail endorsed certificates! Once the certificate is endorsed, it is legal tender and can be exchanged by anyone. It is strongly recommended that certificates not be sent to a transfer agent for registering in the University's name. This procedure is unnecessary and results in needless delays of the transfer.

## VALUATION OF STOCKS AND BONDS OR GIFT CREDITING

For information regarding the valuation of stocks and bonds or gift crediting, please contact the Office of University Advancement at (800) 964-7833 or (512) 448-8430.

# Donor Letter of Transfer

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St. Edward's University provides this form letter to assist the donor in instructing his/her broker to transfer securities as a donation to the university. To assure that the donor receives proper credit for his/her gift, please mail or fax a copy of this letter, including the name and telephone number of the donor's broker, to Cheri Sullivan, director of Advancement Services.

Date: \_\_\_\_\_ To: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Brokerage House: \_\_\_\_\_

Broker Telephone Number: (     ) \_\_\_\_\_ Broker Fax Number: (     ) \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Re: Account Number: \_\_\_\_\_

Securities: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Estimated Value at: \$ \_\_\_\_\_

Please accept this letter as your authorization to deliver the securities from my account, referenced above, to the account of St. Edward's University, per the following instructions:

**Company Name:** State Street Corporation  
**DTC#:** 0997  
**Account Name:** Saint Edward's University, Inc.  
**Account No.:** STUG  
**Tax ID #:** 74-1109641

This gift is designated to \_\_\_\_\_

\_\_\_\_\_  
Grantor Signature Grantor Signature

Home Telephone Number: (     ) \_\_\_\_\_ Work Telephone Number: (     ) \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_