

**Notice of Incoming Stock/Securities Gift**

**Please send completed form to:** [**stocks@willamette.edu**](mailto:stocks@willamette.edu)

Willamette Staff Contact: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Delivering Broker: (Name) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Phone) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Ticker Symbol/Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of Shares: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Expected Date of Gift to WU: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How would you like your gift used at Willamette (i.e., general or specific scholarship fund, annual support, etc.):   
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Please provide the following information to your broker:**

Brokerage Firm: Charles Schwab & Co., Inc.

Attn: Transfer of Accounts, 101 Montgomery Street, San Francisco, CA 94104

FBO: Willamette University

Account Name: Willamette University Corporate Account

Account Number: 7111-9632

Code: 40

DTC number: 0164

Willamette Tax ID: 93-0386972

**Please contact the Office of Gift Planning at giftplanning@willamette.edu or 503-370-6546** ***prior* to transferring securities if any of the following apply:** You are making a gift from your IRA or other retirement account; you hold physical stock certificates; a plan administrator holds your shares; you want to contribute shares in a mutual fund; or you or your financial advisors have any questions.

Your gift is not complete until you receive transaction confirmation from your broker directly.

**Thank you for your support of our students!**