

Stock Transfer Form

Thank you for submitting information online about your intentions to make a gift of stock to St. Lawrence University. To make this gift, please complete the form below and submit it to your broker. Be sure to deliver this through a secure method, such as fax or US Mail.

Please note that these are the instructions for outright stock gifts only. If you wish to make a life-income gift OR give bonds or mutual funds, please contact Planned Gifts at 315-229-5505.

This is a Request From:

Personal Information

Name: _____

Signature: _____

Social Security: _____

Account Number: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Country: _____

I am Instructing My Broker:

Brokerage/ Financial Institution Name: _____

Broker/Contact Name: _____

Broker/Contact Fax: _____

Broker/Contact Phone: _____

To Transfer:

Number of Shares: _____

Of Stock Name: _____

By Anticipated Transfer Date: _____



Delivery Instructions:

St. Lawrence University:

St. Lawrence University
DTC #: 0226
Account #: AB2 037180
Tax Exempt ID #: 15-0532239

Broker Information:

Mark Brooks
Officer
Phone: 816-871-7845
E-mail: mabrooks@statestreet.com

Escalation Contacts:

Grant Danner
Vice President
Phone: 816-871-3869
E-mail: gndanner@statestreet.com

Chris Vokolek
Assistant Vice President
Phone: 816-871-8628
E-mail: ctvokolek@statestreet.com

Special Instructions to Broker:

Special Instructions to St. Lawrence

I would like to designate my gift to the following:

If you have any questions about asset transfers or to learn more about how your gift can help St. Lawrence University, please call St. Lawrence University at 888-758-4438.