



Updated June 24, 2024

Thank you for submitting information online about your intentions to transfer stock to St. Lawrence University. Please use the following DTC stock transfer instructions.

DTC #: 0226
St. Lawrence Account #: AB2 037180
Client Name: ST. LAWRENCE UNIVERSITY
Taxpayer ID #: 15-0532239

In addition, please include a note with your transfer that includes the following information: donor/client name, account number, designation/purpose of gift, and any other instructions.

St. Lawrence University's Broker: State Street Client Service
Address: State Street Bank, 1100 Main Street, Kansas City, MO 64105
Broker name: Aaron Ott, Officer | Institutional Investor Services
Phone: 816-871-7389
E-mail: awott@statestreet.com

If you have questions, or need assistance from St. Lawrence University, please contact:

Philip Mitchell, Chief Clerk
Phone: 315-229-5734
Fax: 315-229-5620
Email: pmitchell@stlawu.edu

Planned Gifts: If you want to transfer securities (stocks, bonds, or mutual funds) or wire funds to establish a charitable gift annuity, charitable trust, or for a pooled income fund, please request special instructions from:

D. Kurt Terrell, Director of Planned Gifts
Phone: 315-229-5026
Fax: 315-229-5620
Email: kterrell@stlawu.edu

Alice David, Administrative Assistant II for Corps & Foundation Relations & Planned Gifts
Phone: 315-229-5505
Fax: 315-229-5620
Email: adavid@stlawu.edu