



GIFT OF STOCK – DELIVERY INSTRUCTIONS

Thank you for considering a gift of appreciated securities to Fordham University. Please note that these electronic transfer instructions apply to stocks and mutual fund shares that can be sent via Automated Customer Account Transfer Service (ACATS). Please call Fordham's Office of Development (212-636-6550) if you have questions about transferring mutual fund shares, physical securities, or Treasury securities to Fordham.

Once you have decided on the stock/s you will transfer to Fordham, please provide the instructions below to your broker for the electronic transfer of stock. Kindly allow sufficient processing time by your broker, particularly at calendar year-end, when at least two weeks may be required.

Please instruct your broker to include your name as the donor on all gift deliveries. We encourage you or your broker to contact our office with notice of the gift being conveyed, to help ensure that Fordham can expeditiously record and acknowledge your gift for tax purposes and allocate the proceeds in accordance with your wishes.

Information for your brokerage firm:

Fordham's Broker:	Bank of New York Mellon Capital Markets
Fordham's Clearing House:	Pershing LLC
DTC Number:	0443
Client Account Name:	Fordham University
Account Number:	N7M001319
Send to the Attention of:	BNYMCM Gift Processing
Fordham's Federal Tax ID:	13-1740451

Donor Information

Donor Name:	Fordham School/Year:
Address:	City, ST ZIP:
Daytime Phone:	Email:

Stock Gift Details

Name/s of Security/ies:	
# of shares/\$ amount:	
Purpose (area you'd like your gift to support):	
Brokerage Firm:	Broker's Name:
Broker's Email:	Broker's Phone:
Donor Signature:	Date:

(Note: The value assigned for internal gift entry purposes is the average of the high and low on the date the assets are actually transferred to Fordham's control. Donors should consult their tax advisor and I.R.S. form 1040 for gifts of cash and listed securities; and I.R.S. form 8283 for non-cash gifts.)

Fordham University
Development & University Relations, Joseph A. Martino Hall, 45 Columbus Avenue, 8th Floor, New York, NY 10023
Attn.: Robert I. Smith Jr.
Assistant Vice President, Development Operations and Donor Engagement
Phone: (212) 636-7441 | stktransfer@fordham.edu

THANK YOU VERY MUCH FOR YOUR GIFT