



where great minds get to work

Office of Advancement
1119 Hanover Street
Fredericksburg, VA 22401

Instructions for Transferring Securities to the
University of Mary Washington Foundation

STEP 1: Complete the following:

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____

Description of Securities (type and number of shares to be transferred):

Approximate Value: _____

Fund Name/Designation: _____

Investment Firm: _____

Broker Name: _____ Phone: _____

STEP 2: Contact and provide the following information to your broker:

UMW Foundation Broker: Cary Street Partners
Broker Phone #: 540/735-2840
DTC#: 0141
FBO: University of Mary Washington Foundation
Account Number: 3667-6721
Account Manager: Ms. Kirby Koch
UMW Tax ID: 540169627

Donor information does not transmit through the DTC wiring system. Please have your broker add your name to the DTC transfer ticket.

STEP 3: Please send completed form via email or fax to:

Attention: Kate Wheeler
kwheeler@umw.edu
540/654-1075 Fax
540/654-2055 Office Phone

Please Note: For tax purposes, the gift date is recognized as the date of transfer. Your gift will be valued based on the average price (the mean between the highest and the lowest selling prices) of the stock on the date received.

Gifts in support of the University of Mary Washington are accepted and managed by the University of Mary Washington Foundation, an affiliated 501 (c) (3) organization. Contributions to the University of Mary Washington are tax deductible as allowed by law. Please see your tax advisor for deductibility.

Signature: _____ Date: _____