

**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:*

<b>UMW Foundation Broker:</b>	Cary Street Partners
<b>Broker Phone #:</b>	540/735-2840
<b>DTC#:</b>	0141
<b>FBO:</b>	University of Mary Washington Foundation
<b>Account Number:</b>	3667-6721
<b>Account Manager:</b>	Ms. Morgan Ellia
<b>UMW Tax ID:</b>	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: Lee Ann Reaser

[ltreaser@umw.edu](mailto:ltreaser@umw.edu)

540/654-1075 Fax

540/654-2069 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:** \_\_\_\_\_