



### **Gifts of Stock – Instructions for Electronic Transfer**

This is the easiest method when a donor maintains holdings in a brokered account. It is also our preferred, and the most expedient, method of transfer. DTC, or Depository Trust Company, is the clearinghouse for electronic security transfer. Each brokerage firm has a specific DTC number. All brokers acting on the Donor's behalf are to code their account as follows for delivery of a stock gift that is DTC eligible:

Custodian Client Name:	VCU School of Business Foundation Gift Clearing Account
Custodian Client Account Number:	7045259
DTC ID Number:	2971
Agent ID Number:	94529

**At least 24 hours prior to delivery**, please contact Mr. Cory Harton, at SunTrust Bank: (804) 782-5240, Fax: (804) 782-5858 to confirm delivery of DTC eligible security.

**Please contact VCU School of Business Foundation before transfer has taken place.** Dr. Ken Blaisdell, Executive Director, can be reached at (804) 828-1487. Contacting the VCU School of Business Foundation prior to a transfer ensures that the donor receives proper credit and that the funds are directed according to the donor's wishes.

For securities NOT eligible for DTC delivery, please contact Dr. Ken Blaisdell at the VCU School of Business Foundation at (804) 828-1487.

These instructions should be delivered to your broker or transfer agent.



### **Gifts of Stock – Instructions for Stock that Arrive by Certificate**

If a donor would like to send or bring by a stock certificate that is in his/her name, a [stock power](#) needs to be included or, less recommended, the stock certificate needs to be signed on the back. [Stock power](#) forms are available via this web site (<http://www.vcu.edu/treasury/stkpower.pdf>) or from any broker. On the [stock power](#) or back of certificate, only fill in:

- the number of shares;
- the type of security (e.g. common or preferred, etc.);
- the name of the corporation; and
- the stock certificate number.

Because the "transfer to" section is left blank, the stock power should be sent under separate cover from the certificate. If the back of the certificate is being filled out in lieu of a stock power and the certificate is going to be sent through the mail or via express delivery, the "transfer to" section should be filled out to **VCU School of Business Foundation** (VCU SOBF). If the certificate is in the VCU SOBF name, no stock power is needed. Please note that the process for re-registering stock certificates (i.e., transferring the certificate into the VCU SOBF name) can take from two to four weeks, so that this is the least efficient method of transfer.

Stock certificates should be sent to:

Virginia Commonwealth University  
School of Business Foundation  
ATTN: Kenneth C. Blaisdell, Ph.D.

U.S. Mail Address: P.O. Box 844000, Richmond, VA 23284-4000

Delivery Address: 1015 Floyd Avenue, Room 3111, Richmond, VA 23284

If the certificates have been re-registered to the VCU School of Business Foundation, a letter should be included identifying the donor.

If you need further assistance or to notify us of an incoming gift of securities, please contact Dr. Ken Blaisdell at (804) 828-1487.