

Making a Gift of Stock to Emory University

Emory University
Office of the Controller
1599 Clifton Road, 3rd Floor
Atlanta, GA 30322

STOCK HELD IN A BROKERAGE ACCOUNT

1. Instruct your broker to transfer the shares electronically to Emory University. Our custodian account is with State Street Bank and Trust. Your gift date is the date the shares are received in the Emory University account. Your gift amount is the average of the high and low price on the day of receipt at Emory.
2. After instructing your broker to make the transfer, please contact the Office of the Controller by phone (404-727-2847) or email (stockgifts@emory.edu) with the type of stock and the Emory account designation so that we can match your name with your gift when it arrives.

Non-endowment gifts:

Account Name: Emory University
Account Number: MRR9
Agent Bank Number: 26022
DTC Participant Number: 997

Endowment gifts:

Account Name: Emory University
Account Number: MRQ2
Agent Bank Number: 26022
DTC Participant Number: 997

STOCK CERTIFICATES IN YOUR POSSESSION

1. Write a brief letter of instruction that includes your name, name of stock(s) and number of shares to be donated, and the Emory account to which you wish your gift to be credited.
2. Sign a stock power form. You can obtain a stock power form from your broker or from the Office of the Controller. Only your signature is required on the form.
3. Mail the *unsigned* stock certificate(s) and letter of instruction in one envelope and the *signed* stock power form in a separate envelope to the address above. Your gift date is the postmark date of the later envelope. Your gift amount is the average of the high and low price of your stock gift on that date.
4. Please contact the Office of the Controller by phone (404-727-2847) or email (stockgifts@emory.edu) to let us know the gift is in progress.

NOTE: If you have a certificate for more shares than you wish to donate, please include your Social Security number and a written note specifying how many shares you wish to donate and how many shares should be returned to you. Please be sure to include an address for the new certificate to be sent. It generally takes four to six weeks for a new stock certificate to be issued in your name.

MUTUAL FUND GIFTS

Please contact the Office of the Controller by phone (404-727-2847) or email (stockgifts@emory.edu) for information about making a gift of mutual fund shares. Please be advised that mutual fund transfers may take up to four to six weeks to accomplish.

CLOSELY HELD AND OTHER STOCK GIFTS

Please contact the Office of Gift Planning for information about making a gift of closely held stock or other forms of stock ownership. Call 404-727-8875 for more information.

Emory University
Office of Gift Planning
1762 Clifton Road, Suite 1150
Atlanta, GA 30322