

Making a Gift of Stock to Emory University

If you plan to make a gift of stock from a brokerage account to Emory University, please contact the Office of the Controller, to let us know the gift is in progress. Call 404.727.2824.

Emory University
Office of the Controller
305 Administration Building
Atlanta, GA 30322

STOCK HELD IN A BROKERAGE ACCOUNT

- Instruct your broker to transfer the shares electronically to Emory University. Our brokerage account is with State Street Bank and Trust.
- After instructing your broker to make the transfer, contact the Office of the Controller (information above) 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

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 that day.

-Continued on reverse side

STOCK CERTIFICATES IN YOUR POSSESSION

- Write a brief letter of instruction that includes your name, name of stock(s) and number of shares to be donated.
- Sign a stock power form. You can obtain a stock power form from your broker or from our office. Only your signature is required on the form.
- 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 below.
- Contact the Emory University Office of the Controller to let us know the gift is in progress (address on reverse side).
- 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.

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. It generally takes four to six weeks for a new stock certificate to be issued in your name.

MUTUAL FUND, CLOSELY HELD, AND OTHER STOCK GIFTS

Please contact the Office of Gift Planning for information about making a gift of mutual fund shares, 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 NE
Atlanta, GA 30322

