



Gifts of Stock and Securities

Thank you for considering making a gift of publicly-traded stock or securities to the Northern Arizona University Foundation, Inc. Below is the information to give to your broker. If you are interested in transferring closely-held securities, please contact us at the number below for information.

Please call us when you instruct your broker to transfer the stock so that we know to credit you for this gift. When stock is transferred to our account, the information about the contributor is not transferred with it so we would have no way of knowing who to thank and to whom to send receipts.

Transfers of securities may take several days depending on your broker. The NAU Foundation values the gift using the method accepted by the IRS, the average of the stock value on the day we receive the securities into our account. Please call us if you have any questions.

Account Information:

DTC #0062

Account #27985508

Account Name: NAU Foundation, Inc.

Contact info for broker: Vanguard Brokerage Services (800) 992-8327

NAU Contact:

Anne Morgan

Director of Gift Planning

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