

## Stock Donation Procedure

The University of New Orleans Foundation has a Merrill Lynch account that stock donations can be transferred to. Have your broker transfer your stock to the following:

Merrill Lynch

Broker: Scott Hardie and Maria Johnson  
Phone #: 504-586-7644  
Acct name: University of New Orleans Foundation  
Acct #: 59404A35  
DTC#: 8862

We ask that you also notify us of your stock transfer so that we may appropriately credit and acknowledge your generosity. Please use the attached **Stock Donation and Transfer Form** to tell us the following information:

- Name of stock transferred
- Number of shares
- Copy of brokerage firm stock transfer instructions (including any restrictions on liquidating)
- Approximate date of transfer, and
- How would you like your gift to be used?

For Questions or Additional Information, Contact:

Jeff Bush  
Chief Development Officer  
**THE UNIVERSITY of NEW ORLEANS**  
Phone: 504.280.3996 | Fax: 504.280.1080  
Email: [jbush@unofoundation.org](mailto:jbush@unofoundation.org)

# University Of New Orleans Foundation Stock Donation and Transfer Transmittal Form

## Stock Donation Procedure

1. Stock transfers should be made to the following University of New Orleans Foundation Merrill Lynch account:

- a) Merrill Lynch
- b) Broker                Scott Hardie and Maria Johnson
- c) Phone #                504-586-7644
- d) Acct name:            University of New Orleans Foundation
- e) Acct #                 59404A35
- f) DTC#                 8862

2. We ask that you also notify us of your stock transfer so that we may appropriately credit and acknowledge your generosity. Please include the following information:

- a) Name of stock, electronically traded funds (ETFs) or mutual fund transferred: \_\_\_\_\_
- b) Stock, electronically traded funds (ETFs) or mutual fund symbol (if known): \_\_\_\_\_
- c) Number of shares, including fractions, if applicable: \_\_\_\_\_
- d) Copy of brokerage firm stock transfer instructions (including any restrictions on liquidating)
- e) Approximate date of transfer: \_\_\_\_\_
- f) Instructions on how your gift is to be used:

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3. Donor Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State \_\_\_\_\_ Zip \_\_\_\_\_

Preferred email: \_\_\_\_\_

Preferred phone: \_\_\_\_\_

Please Return to:

Jeff Bush  
Chief Development Officer  
**THE UNIVERSITY of NEW ORLEANS**  
Phone: 504.280.3996 | Fax: 504.280.1080  
Email: [jbush@unofoundation.org](mailto:jbush@unofoundation.org)