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
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:
      ______________________________________________________________________________________
      ______________________________________________________________________________________
      ______________________________________________________________________________________
      ______________________________________________________________________________________

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: jibush@unofoundation.org