

## INSTRUCTIONS FOR STOCK TRANSFERS

The Marshall University Foundation Inc.  
519 John Marshall Drive  
Huntington, WV 25703  
Contacts: Scott Anderson, CFO, phone: 304-696-3388  
Lee Graham, Finance Manager, phone: 304-696-6297

### **Stock Transfers:**

Donors may request their brokers transfer securities to the account of the Marshall University Foundation listed below:

Morgan Stanley Smith Barney  
for the Marshall University Foundation  
Account number: 808-108158-710  
DTC: 0015

\*In order for the donor to receive proper recognition credit, please fax (304) 696-3541 or email [lee.graham@marshall.edu](mailto:lee.graham@marshall.edu) or [anderson119@marshall.edu](mailto:anderson119@marshall.edu) the following information: Donor name, security name, number of shares and the transfer date. The gift designation information will also be required.

### Note

In accordance with IRS regulations, a gift to the Foundation of a DTC'd security or properly endorsed stock certificate (or stock certificate and stock power) is completed on the date of mailing or delivery to the Foundation or the Foundation's agent. This date will be used to internally establish the value of the gift.

Donors should consult their tax advisor about the deductibility of their gift.

REV 12/19/2016