

Stock Donation Procedure

The UNO 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
Phone #: 504-586-7644
Acct name: UNO 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 you would like your gift to be used?

For Questions or Additional Information, Contact:

Jeff Bush
Director of Development
THE UNIVERSITY of NEW ORLEANS
Homer L. Hitt Alumni & Visitors Center
2000 Lakeshore Drive
New Orleans, LA 70148
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
- c) Phone # 504-586-7644
- d) Acct name: UNO 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:

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Director of Development
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