

Security Transfer Form

1. Contact the University of Wyoming Foundation to tell us about your gift.

If you wish to donate shares of stock to the University of Wyoming, we encourage you to first contact the University of Wyoming Foundation at (307) 766-4696 or by email at fdn-gift-intake@uwyo.edu. To ensure the proper allocation and receipt of your gift, our donor relations team will ask and record your responses to the following questions.

Date: _____

Donor(s) Name(s): _____

Firm Name/Brokerage Company Name: _____

Anticipated Transfer Date: _____

Anticipated Amount: _____

Security or type of asset(s) to be transferred: _____

Do you have a point of contact at UW Foundation? If so, who? _____

How should your gift be allocated? To support a specific fund or unit at UW? _____

2. Initiate your security transfer to the University of Wyoming Foundation.

After contacting the University of Wyoming Foundation, initiate your security transfer or contact your broker to do so for you. Your shares can be transferred directly from your brokerage account to the University of Wyoming Foundation's brokerage account at U.S. Bank using the account information below. In addition to stocks, we accept equity securities, corporate bonds, municipal bonds, and various mutual funds. For donations of treasury notes or investment vehicles not mentioned, contact us at (307) 766-6300.

UW Brokerage Account Information

For Securities from ACAT Member Firms and DTC Eligible Securities from Non-ACAT Firms:

Contact: Sean Valentine, US Bank
(1-503-464-4841)
U.S. Bank Institutional Trust & Custody
555 SW Oak Street 6th Floor, PD-OR-P6TD
Portland, OR 97204

DTC #2803
Account #: 19-520701
Account Name: University of WY FDN - SHORT-TERM

Thank you for supporting the University of Wyoming.

For University of Wyoming Foundation Internal Use

Donor Primary ID: _____

Fund Designation #: _____