



# Cleveland State University Foundation

## GIFTS OF STOCK TRANSFER

**Please note** - Send one copy to CSU Foundation, send one to your broker, and keep one for your records.  
Cleveland State University Foundation - 2121 Euclid Avenue, UN 501 - Cleveland, OH 44115-2214

### PART 1 - TO BE COMPLETED BY DONOR

Name \_\_\_\_\_ Date \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Phone Number(s) \_\_\_\_\_ Work \_\_\_\_\_ Home \_\_\_\_\_  
Email \_\_\_\_\_

Please designate my gift to the following Program, School or Fund at CSU:

\_\_\_\_\_  
\_\_\_\_\_

Broker Name and Brokerage Firm

\_\_\_\_\_

Type of Stock:       Common                       Preferred                       Restricted  
                                  Publicly Traded               Non-Publicly Traded               Mutual Funds

Name of Stock/Symbol \_\_\_\_\_ Number of Shares \_\_\_\_\_

The undersigned (donor) authorizes the transfer of this stock to the CSU Foundation.

\_\_\_\_\_

### PART 2 - INFORMATION FOR BROKER:

**Instructions - Please transfer my gift to the CSU Foundation as follows:**

#### Stock/Mutual Funds

45 East Washington Street, Suite 200  
Chagrin Falls, Ohio 44022  
Attention: Steven Penton  
Phone - 440-542-6138  
Fax - 440-565-0190

#### DTC (electronic transfer) Delivery instructions

Deliver to DTC Number 8862 for credit to  
Account Number: 646-04460  
Account Name: Cleveland State University Foundation, Inc.

**IRS Tax Identification Number for CSU Foundation:** 34-1316665

### PART 3 - TO BE COMPLETED BY CSU FOUNDATION:

High & Low Prices for the Securities on Gift Date \_\_\_\_\_

Gift Date \_\_\_\_\_ Mean \_\_\_\_\_

Donor Gift Value \_\_\_\_\_

Millennium Code # \_\_\_\_\_

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**Additional questions may be directed to Cleveland State University.**

John N. Petrus, CPA, JD, Asst. VP Finance & Administration, Asst. Treasurer, CSU Foundation - 216.523.7240 (office), 216.687.9270 (fax)  
Mary Kelly, Coordinator of Donor Records - 216.523.7291 (office), 216.687.9278 (fax)