



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 Publicly Traded Preferred Non-Publicly Traded Restricted 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
Merrill Lynch
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: 6HJ04460
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)
Shalmoli Frese, Director of Advancement Services - 216.875.9878 (office)