

Georgetown University Gifts of Stock Transaction

Thank you for considering a gift of stock to Georgetown. According to IRS regulations, the date of your gift corresponds to the date it arrives in our broker's possession (for transfers from brokerage account to brokerage account). Please email stocktransfer@georgetown.edu if you have any questions.



TRANSFER INSTRUCTIONS

DTC NUMBER

0221

ACCOUNT NUMBER

3B-48090

ACCOUNT NAME

Georgetown University

BROKER INFORMATION

*UBS Financial Services/
The Fidelity Group*

MUTUAL FUNDS

If you would like to make a gift of mutual funds, please contact the Office of Planned Giving at 800-347-8067 or by email at stocktransfer@georgetown.edu before initiating the transfer to ensure your mutual fund can be received by Georgetown.

STOCK CERTIFICATES

If you are donating physical stock certificates, please contact the Office of Planned Giving at 800-347-8067 or by email at stocktransfer@georgetown.edu.

Contact Information **required*

NAME*

ADDRESS*

CITY*

STATE*

ZIP CODE*

PHONE NUMBER

EMAIL ADDRESS

SCHOOL AND CLASS YEAR/AFFILIATION

SPOUSE NAME

SPOUSE SCHOOL AND CLASS YEAR/AFFILIATION

BROKERAGE/FINANCIAL INSTITUTION*

BROKER NAME*

BROKER PHONE*

Gift Information

Expected date of transfer (mm/dd/yyyy): ____ / ____ / ____

- I am unsure of the exact stock/securities that will be donated. However, I will follow-up with your office once the decision is made.
- I want to donate the following stocks/securities:

STOCK/SECURITY	NUMBER OF SHARES	APPROXIMATE VALUE (USD)
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_____	_____	_____
_____	_____	_____
_____	_____	_____

PURPOSE/USE/DESIGNATION OF PROCEEDS:

- This gift is a pledge payment.



PHONE

800-347-8067



EMAIL

*stocktransfer@
georgetown.edu*



MAIL

*Georgetown University
Office of Planned Giving
2115 Wisconsin Ave. NW
Suite 500
Washington, DC 20007*



FEDEX OR UPS

*Georgetown University
Office of Planned Giving
2115 Wisconsin Ave. NW
Suite 500
Washington, DC 20007*



FAX

202-687-4902