



DELTA UPSILON

EDUCATIONAL FOUNDATION

Stock Gift Instructions

ELECTRONIC TRANSFERS (Wire)

Electronic transfers are the most common way to make a stock gift to the Foundation. To initiate the stock transfer, simply share the instructions below with your broker:

Stock Instructions:

Delta Upsilon Educational Foundation
A/C # 1051-8517
Charles Schwab & Co. Inc.
DTC Clearing 0164
Code 40

Please notify the Foundation staff so we can properly credit you for the stock gift. Oftentimes stock transfers do not include the donor's name, so please contact Senior Staff Accountant Mary Ellen Watts at (317) 875-8900 or watts@deltau.org, and provide the following information:

- Donor's name
- Name of the Stock Holding Company initiating the transfer
- Number of shares and approximate date of the transfer

Please call a member of the Foundation staff at (317) 875-8900 if you have questions or want to inform us of a pending transfer.

TRANSFER VIA MAIL

If the Stock is in the Donor's Name:

1. Stock power must be signed by the donor. The form must also have a signature guaranteed. Please do NOT put a date anywhere on the form. No other sections need to be completed.
2. A letter signed by stock owner(s) asking to deposit the stock into the Account # 1051-8517 of Delta Upsilon Educational Foundation at Charles Schwab & Co. Inc.
3. Mail the above documents to:
Delta Upsilon Educational Foundation
8705 Founders Road
Indianapolis, IN 46268-1338

****NEVER SEND THE STOCK CERTIFICATE & THE STOCK POWER TOGETHER**

If the stock is in Delta Upsilon Educational Foundation's name, please send the certificate to:

Delta Upsilon Educational Foundation
8705 Founders Road
Indianapolis, IN 46268-1338