

# Transferring Securities to UWF

Donor stock transfers are made in one of two ways:

- Electronic Transfer (DTC)
- Physical Certificate – Donor's Name

NOTE: One of the following procedures must be used for each and every stock transfer. Following the procedures identified below will ensure that proper credit is given to the donor.

## Electronic Transfer (DTC)

When donors' stocks are held by a broker, the donor instructs the broker to send a copy of confirmation to the UWF Foundation, indicating his or her name, the stock being transferred, and the date of transfer. The donor then follows up with a letter to the UWF Foundation with instructions regarding gift designation and instructs the broker to send the stock(s) to the UWF Foundation account:

Raymond James  
19 West Garden Street, Suite 210  
Pensacola, FL 32502

Primary Contact: Daniel Herman, Vice President  
Assistant: Laurie Roberts  
Account # 26796723  
DTC # 0725

Phone: 850.434.2207  
Toll-Free: 800.347.7643  
Fax: 850.434.0060

NOTE: For proper gift credit, please include the donor's name.

## Physical Certificate – Donor's Name

When stocks are held by the donor and are registered in his or her name, the donor mails either a signed stock certificate or an unsigned stock certificate with a signed stock power (sent under separate cover). The donor then prepares a letter authorizing the shares to be deposited into the UWF Foundation's brokerage account, stating gift designation. Mail letter, certificates, and stock power to:

UWF Foundation, Inc.  
11000 University Parkway  
Building 12  
Pensacola, FL 32514