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