

Securities Transfer Request Form



Shares can be transferred directly from your brokerage account to the University of Utah's account. Complete the form below and **send a signed copy to your broker. Only your broker can initiate the transfer.** Some brokerage firms require this letter to be notarized or medallion signature guaranteed. Please check with your broker for additional requirements. If you wish to make a gift of mutual funds, bonds, foreign or restricted stock, please contact Josh Tews at (801) 585-0752 as these require special handling. Thank you!

Please email or fax a copy of this completed form to josh.tews@admin.utah.edu or fax at (801) 585-5132.

DATE: _____

TO: _____ (Broker Name)

_____ (Brokerage Firm)

_____ (Broker Phone Number)

Please accept this letter as your authorization to irrevocably transfer:

(name of stock, number of shares)

which you hold in the name of:

(account title at brokerage firm)

From my account number: _____

To the account of the University of Utah. Please transfer via DTC as follows:

Wells Fargo Donated Securities: DTC2072

Account Number: 1AB26018

Account Registration: University of Utah

Tax ID 87-6000525

Contact: Brandon Hodge (206) 292-3512

Agent Bank #: 52196

Institution #: 68842

SWIFT code: WFBIUS6S

Signature(s) of account owner(s):

Please provide the University of Utah with my name as donor of this gift.

Gift Designation (purpose of gift): _____