Securities Transfer Instructions

Prior to any transfers, please contact Becky Brown or Keith Kompsi with name of the donor, name of the stock, the number of shares, and approximate total market value.

Transfer by Wire

Write your securities company, broker, or mutual fund administrator a letter that contains the following statement:

"This is your authorization to transfer _____ (number) of shares of _____ to Goldman, Sachs & Co. for deposit to Account number 026-16505-0, in the name of California State University, Fresno Foundation. DTC number 0005."

Our broker cannot liquidate stock without knowing its source. To help us confirm your gift upon arrival, please send us by mail, fax or e-mail a copy of your letter:

California State University, Fresno
Office of Planned Giving
5244 N. Jackson Ave., M/S KC45
Fresno, CA 93740-8023
Phone: (559) 278-1877 / Fax: (559) 278-7925
E-mail: beckyb@mail.fresnostate.edu

Transfer by Delivery Service

If you use the **U.S. Postal Service**, your gift is completed as of the postmarked date. If you use **FedEx**, **UPS** or another delivery service, or if you hand-deliver the certificates, your gift is completed when received by an authorized representative of Fresno State.

Unsigned certificates should be sent in one envelope. A fully executed "Stock Power" form should be sent in a separate envelope.

The amount of your tax deduction depends on the value of the securities on the date the gift is received by our advisor. This date is important for your tax planning, especially at year-end. To be sure that your gift is completed by December 31 of any year, allow a minimum of 10 working days for the transfer of stocks and bonds.

For mutual funds, the transfer will take longer to process. Please contact Becky Brown or Keith Kompsi for more information.

Questions?

Becky Brown, Director of Development
(559) 278-1877 • beckyb@mail.fresnostate.edu

Keith Kompsi, Foundation Financial Services
(559) 278-0838 • kkompsi@mail.fresnostate.edu