

Securities Transfer Instructions

Prior to any transfers, please contact Liz Garvin or Keith Kompsi with the name(s) of the stock being sent, including the number of shares, and the approximate total market value for each, and the donor's names.

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 #026-16505-0, in the name of California State University, Fresno Foundation. DTC #005.”

- ✓ 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
(559) 278-4038 / Fax (559) 278-7925
E-mail: egarvin@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.

Notes:

- ***If you wish to donate Mutual Funds, please reach out to us for instructions.***
- The amount of your tax deduction depends on the value of the securities on the date the gift is received and completed. 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.
- The rules for transferring securities are not complicated but they are strict. If you have any questions, or to let us know if this is a NEW gift please contact:

Liz Garvin, Director of Planned Giving, at (559) 278-4038, egarvin@mail.fresnostate.edu or Keith Kompsi, Foundation Financial Services, at (559) 278-0838, kkompsi@mail.fresnostate.edu

Please note that a transfers of shares of a mutual fund takes more time, and requires that a special account be established on our end prior to any transfer being initiated.