

## GIFTS OF STOCK, BONDS, AND OTHER SECURITIES

### STOCK GIFT FORM

The submission of this form notifies Wabash College of an anticipated gift of stock, bond, or security, and the designations for the gift.

#### Instructions:

- ❖ Complete the form, then either email or send it to the address located at the bottom of the page.
- ❖ Alternative methods include sending the form to your broker to be completed and submitted. However, if this method is chosen, you will need to grant your broker permission before the form can be sent.

Instruct your Broker/Financial Advisor to transfer your gift of securities to Morgan Stanley via the Depository Trust Company (DTC) transfer system as follows:

**Morgan Stanley Wealth Management:** DTC Number #0015

**Account Name:** Wabash College

**Wabash Federal ID number:** 35-0868202

**Account Number:** 803-011009-268

**Attn:** Rhonda K. Kyle - Assistant Vice President, Wealth Management Associate - Financial Planning Specialist

**Phone:** (765) 420-8411 or (800) 343-9743 **eFax:** 765-274-0772 **Corp Cell:** 765-246-8479

#### Donor Information:

Name \_\_\_\_\_ Class Year \_\_\_\_\_  
Street address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_  
Telephone \_\_\_\_\_  
E-mail \_\_\_\_\_

#### Donor Broker Information:

Brokerage firm \_\_\_\_\_  
Broker name \_\_\_\_\_  
Broker phone \_\_\_\_\_  
Broker fax \_\_\_\_\_

#### Transfer of Securities Information:

Anticipated date of transfer \_\_\_\_\_

Please describe the securities being transferred: (Indicate the name of each security, number of shares, and the approximate dollar value)

Please provide the designation and distribution for the gift(s): (If the gift is not going to the Wabash Annual Fund)

If you have any questions about the instructions, please call Joe Klen at 765-361-6052 or Angie Marlin at 765-420-8407.

Email form to: Joseph Klen (klenj@wabash.edu)

Or send to: Wabash College, Advancement Office, 301 W. Wabash Ave., Crawfordsville, IN 47933

*Thank you for making a difference!*