

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: 803-011009-052

Attn: Rhonda K. Kyle

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 Rhonda Kyle at 765-420-8411.

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!