



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Gifts of Publicly-traded Securities Office of University Development

Thank you for your interest in making a gift of securities to the University of North Carolina at Chapel Hill. Please share these instructions with your broker to help facilitate your gift and contact the Office of Gift Services with any questions.

If the securities are held electronically:

Your bank or broker may transfer stock to UNC's brokerage account with the information below.

Brokerage: Wells Fargo Advisors
Account Name: UNC-Chapel Hill
Account Number: 89994225
DTC Number: 0141
WF Contact #: (800)-678-1188

It is important that the bank or broker contact the Office of Gift Services in order for us to identify the transfer in a timely and accurate manner. **What information is helpful?** To help us correctly identify, value and receipt your gift in a timely manner, the following information from you or your broker is important.

- Donor's name
- Stock information (number of shares, name of stock and symbol)
- Originating broker
- Designation of gift, if known

If you hold the securities in certificate form:

Please send by first-class mail or hand deliver the **unendorsed** certificate(s) along with a letter of transmittal which includes your name, address and where you want the gift designated.

In a separate envelope, mail to the same address a copy of the transmittal letter along with a **stock power executed in blank** for each stock certificate you are donating. You should sign one stock power for each stock certificate and have your signature guaranteed by a bank officer. The bank officer should **not** date the signature guarantee.

If you prefer to have your certificate re-registered:

The shares that you wish to donate to UNC should be registered to "The University of North Carolina at Chapel Hill." The tax identification number is 56-6001393.

For assistance with a transfer or for more information, please contact:

Rebecca Swartz, *Director of Gift & Data Management*
direct phone: 919-962-3047
email: rebecca.swartz@unc.edu

Krishna Ellis, *Stock/Cash Account Manager*
direct phone: 919-962-8189
email: krishae@unc.edu

OFFICE OF UNIVERSITY DEVELOPMENT
T 919.962.2336 • F 919.962.2387
giving.unc.edu

MAILING ADDRESS: PO Box 309 • Chapel Hill, NC 27514-0309
DELIVERY ADDRESS: 208 W. Franklin Street • Chapel Hill, NC 27516-2520
CAMPUS ADDRESS: Campus Box 6100

Rev 5/15/2023