



**THE UNIVERSITY AT ALBANY FOUNDATION**  
**Gift of Stock Form**

If the donor holds the stock certificate, contact Jeffrey Jones, CFO to arrange the transfer.  
If the stock is held in street name (i.e., at brokerage) fill out this checklist:

TRANSFERRING BROKERAGE:

CONTACT PERSON:

\_\_\_\_\_ Phone: \_\_\_\_\_

# of shares: \_\_\_\_\_ Approximate value \$ \_\_\_\_\_

Name of stock: \_\_\_\_\_ Stock symbol: \_\_\_\_\_

Name of donor: \_\_\_\_\_

Donor's address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Donor's phone: \_\_\_\_\_

Donor's e-mail: \_\_\_\_\_

Purpose of gift: \_\_\_\_\_ UProgress Fund  
\_\_\_\_\_ School or College \_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_\_\_ Confirm that the donor will provide a letter -- mailed or faxed to Development Office  
(fax: 518.437.4749) -- with donor information and purpose of gift (necessary for audit  
purposes).

The transferring brokerage should electronically transfer the stock to the Foundation's account at  
Charles Schwab:

**DTC # 0164**

Account name: **The University at Albany Foundation**

Account number: **8769-8796**

Please advise Jeffrey Jones via e-mail of the stock gift transfer with the information on this  
checklist.