



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 The University at Albany Foundation office (fax: 518.437.5089) -- 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.