



## Stock Gift Form

### PART 1, TO BE COMPLETED BY DONOR:

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number(s) Work \_\_\_\_\_ Home \_\_\_\_\_

Please designate my gift to the following Program, School or Fund at PSU:

\_\_\_\_\_  
\_\_\_\_\_

Broker Name and Brokerage Firm:

\_\_\_\_\_

Type of Stock:  Common  Preferred  Restricted  
 Publicly Traded  Non-Publicly Traded  Mutual Funds

Name of Stock/Ticker Symbol: \_\_\_\_\_ Number of Shares \_\_\_\_\_

The undersigned (donor) authorizes the transfer of this stock to the PSU Foundation.

\_\_\_\_\_

### PART 2, INFORMATION FOR BROKER:

**Instructions – Please transfer my gift to the PSU Foundation as follows:**

**Stock:**

**Wells Fargo Bank**

Account # 28155733

DTC Number 0141

In the name of PSU Foundation

**If you wish to donate Mutual Funds, please call  
Stacey Henriquez at (503) 725-5863 or Phuong  
Lam at (503) 725-4473.**

UBS Financial Services

Account # LL13120

DTC Number 0221

### PART 3, TO BE COMPLETED BY PSU FOUNDATION:

High & Low Prices for the Securities on Gift Date \_\_\_\_\_

Gift Date \_\_\_\_\_ Mean \_\_\_\_\_

Donor Gift Value \_\_\_\_\_ Sale Date \_\_\_\_\_

Sale Price per Share \_\_\_\_\_ Sale Proceeds \_\_\_\_\_

**Please note** — Send one copy to PSU Foundation, send one to your broker, and keep one for your records.

Portland State University Foundation

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Fax 503-725-5876

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