



## STOCK GIFT TRANSFER INSTRUCTIONS

Thank you for your generous gift to the University of South Dakota. The following is the process for transferring stock to the University of South Dakota Foundation:

**Please follow the steps below for a direct transfer of stock:**

<b>STEP 1: Notification to the University of South Dakota Foundation</b>	<b>STEP 2: Notification to the Broker</b>
<p>To ensure you receive credit for your gift and it is designated as you wish, please contact:</p> <p style="padding-left: 40px;">University of South Dakota Foundation Attn: Peggy Mach, Controller 1110 N Dakota St Vermillion, SD 57069 Email: <a href="mailto:peggy.mach@usdfoundation.org">peggy.mach@usdfoundation.org</a> Phone: (605) 741-5050</p> <p>Please include the following information:</p> <ul style="list-style-type: none"> <li>• Donor name</li> <li>• Approximate date the transfer will be made</li> <li>• Type and number of shares gifted</li> <li>• Designation of the gift (i.e., purpose/fund)</li> </ul>	<p>Provide the following instructions to your broker:</p> <p>Broker: Merrill Lynch Contact: Tucker Johnson Phone: (612) 285-9506 (preferred) Email: <a href="mailto:Tucker.a.Johnson@ml.com">Tucker.a.Johnson@ml.com</a></p> <p>Account: University of South Dakota Foundation Account No: 8RW-04387 DTC: 8862</p>

**Acknowledgment of the Gift:**

When the communication describing the intent to donate is received, the USD Foundation will be notified by the investment advisor at Merrill Lynch. On the day the stock is received into the USDF account, a gift will be recorded equal to the average of the high and low market price on that day. Once the funds are deposited into the USD Foundation’s bank account, the gift will be recorded, and a gift acknowledgment will be mailed to the donor.

To transfer stock to a different broker or to transfer stock in the physical form, please contact Peggy Mach at the contact noted above.