

Instructions for Gifts of Securities

1. **Notify our office and your broker** of your intended gift by completing the *Notice of Intent* section of the *Security Gift Form*. This ensures that your gift is properly identified, designated and processed accurately and on a timely basis.
2. **Determine the method of gift transfer.**
 - a) Electronic transfer –the preferred and most efficient method.
(Information for your broker is provided on the *Security Gift Form*.)
 - b) Mail – stock certificates held by the donor or broker require special processing. (Instructions are included on the *Security Gift Form*.)
 - c) Mutual Funds – refer to special instructions on the *Security Gift Form*.
3. **For assistance, please contact the Medical Alumni Association Office.**
Executive Director Barry Collins, (434-924-1734) or e-mail at barrycollins@virginia.edu
Office (434-924-1734) or e-mail at medalum@virginia.edu

U.S. mail address:

UVA Medical School Foundation
P.O. Box 800776 Health System
Charlottesville, VA 22908-0776

Delivery address:

UVA Medical School Foundation
1111 West Main Street
Charlottesville, VA 22903
Fax number: 434-982-3202

Administrative Fee on Gifts

UVA Health System and its affiliated foundations apply a 5% administrative fee to all restricted gifts and pledge payments to support School of Medicine, School of Nursing and Medical Center operations.

PLEASE NOTE: For tax reasons, it is usually in the donor's best interest not to sell securities before making a gift of stock. Tax advice is not offered by our office and should be obtained by the donor from a professional.



SECURITY GIFT FORM

NOTICE OF INTENT (please forward to our office and your broker)

Donor's name: _____

Donor's address: _____

Donor's telephone number _____ E-mail _____

Security(ies) and Number of shares: _____

Expected date of transfer: _____

Transfer type: _____ electronic (DTC) *OR* _____ mutual fund transfer

OR _____ stock certificate & stock power (when donor or broker holds certificates)

Gift Designation: _____

(eg. Class Fund, Endowment, Annual Giving (unrestricted), Dues or other named fund)

Transferring broker firm name & contact person: _____

Broker's address: _____

ELECTRONIC TRANSFER INFORMATION (for donor's broker)

Clearing broker: Pershing & Company DTC Number: 443

Account Number N7M-001327

Account Name: University of Virginia Gift Account

Reference: [donor's name]

NON-ELECTRONIC TRANSFER INFORMATION

A. Stock Certificates held by the donor or donor's broker.

Please forward the following to our office, Attention: Director of Accounting

For security reasons, please mail separately. (The signed stock power form and certificate together are negotiable). Please include *Notice of Intent* information.

1. Unsigned certificates or bonds.
2. Stock power form signed by the individual named on the stock certificate and their signature medallion-guaranteed by a bank or broker.

Do not complete any other information on the form.

B. Mutual Fund gifts (contact our office if special assistance is required)

Contact your mutual fund directly for specific instructions and allow extra time for processing (often 3-5 weeks and could be longer in December).

TIMING OF GIFTS –gifts must be transferred (post-marked, if mailed, or delivered, if sent by carrier) no later than December 31st for calendar year-end gifts or June 30th for fiscal year-end gifts.