

**GENERAL GIFTING INSTRUCTIONS FOR SECURITIES
LAFAYETTE COLLEGE**

Development Office, 307 Markle Hall, Easton, PA 18042
Phone: (610) 330-5929 FAX: (610) 330-5928 Email: hayess@lafayette.edu

A gift of securities is considered to be completed on the "date of delivery" (when the stock is in a Lafayette brokerage account, or on the postmark date, if mailed), which determines the value of the gift. Contact Stephanie A. Hayes '94 at (610) 330-5929 or hayess@lafayette.edu or Leah Heinrich at (610) 330-4407 or heinricl@lafayette.edu for more information.

NOTE: If you are funding a life income agreement, please contact Joe Samaritano with the Planned Giving Office at 610-330-5047 or samaritj@lafayette.edu for different instructions.

1. Securities

PLEASE NOTIFY THE DEVELOPMENT OFFICE BEFORE TRANSFERRING/MAILING STOCK CERTIFICATES BY CALLING 610-330-5929.

A. Securities Held in a Broker or Bank Account – see Security Transfer Form

Complete the "General Security Transfer Form" and mail or fax it to your broker/bank. Fax a copy to Lafayette College at (610) 330-5928 or email to Leah Heinrich at heinricl@lafayette.edu. Please include where you would like to direct your gift on the form.

B. Security Certificate Held by Donor

A letter should accompany the stock certificate(s) with instructions on the use of the gift. DO NOT endorse the certificate(s). Instead, endorse the Stock Power(s) and mail it/them in a separate envelope. *Please note that a Medallion Signature Guarantee is required on the Stock Power.* This is a stamp provided by your financial institution when your signature is verified. Both mailings should be sent to:

Lafayette College
Development Office
307 Markle Hall
Easton, PA 18042-1774

C. Mutual Funds

Please contact Stephanie A. Hayes '94, Executive Director of Campaign and Development Operations, at 610-330-5929 or hayess@lafayette.edu to coordinate delivery.

LAFAYETTE COLLEGE
GENERAL SECURITY TRANSFER FORM
Development Office, 307 Markle Hall, Easton, PA 18042
Phone: (610) 330-5929 Fax: (610) 330-5928

DONOR INSTRUCTIONS TO BROKER/BANK

Important: To insure proper credit for your gift, please mail a copy of the instructions given to your broker/bank to:
Lafayette College, Development Office, 307 Markle Hall, Easton, PA 18042-1774 or fax to: (610) 330-5928.

Name of Broker: _____

Firm Name: _____

Firm Address: _____

Street

City

State

Zip

Broker Phone Number: _____ Fax Number: _____

Name of Donor(s): _____

Donor Phone Number: _____ Fax Number: _____

Donor Address: _____

Street

City

State

Zip

I hereby authorize you to transfer the following securities from my account:

Donor Brokerage Account Number: _____

Number of Shares & Security Name: _____ Date Acquired (if known): _____

The designation or purpose of this gift is as follows: _____

(Signature of Donor)

(Date)

(Signature of Joint Donor if applicable)

(Date)

BROKER INSTRUCTIONS

Please transfer these securities using the following instructions:

DTC Eligible Securities: Pershing, LLC DTC # 0443 ID Agent Bank # 00443

Account #: N7M100236 Account Name: Lafayette College Fax #: (412) 236-4929

Fed Eligible Securities: ABA# 021-000-018 Bank of NY/Pershing

For Credit to account #: N7M100236 Client account name: Lafayette College