



Cleveland State University Foundation

GIFTS OF STOCK TRANSFER

Please note - Send one copy to CSU Foundation, send one to your broker, and keep one for your records.
Cleveland State University Foundation - 2121 Euclid Avenue, UN 501 - Cleveland, OH 44115-2214

PART 1 - TO BE COMPLETED BY DONOR

Name _____ Date _____
Address _____
City _____ State _____ Zip _____
Phone Number(s) _____ Work _____ Home _____
Email _____

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

Broker Name and Brokerage Firm

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

Name of Stock/Symbol _____ Number of Shares _____

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

PART 2 - INFORMATION FOR BROKER:

Instructions - Please transfer my gift to the CSU Foundation as follows:

Stock/Mutual Funds

Merrill Lynch, 1375 E. 9th Street
Cleveland, OH 44114-1798
Attention: John Moss
216.363.4743 (office), 216.539.0938 (fax)

DTC (electronic transfer) Delivery instructions

Deliver to DTC Number 5198 for credit to
Account Number: 646-04460
Account Name: Cleveland State University Foundation, Inc.

IRS Tax Identification Number for CSU Foundation: 34-1316665

PART 3 - TO BE COMPLETED BY CSU FOUNDATION:

High & Low Prices for the Securities on Gift Date _____

Gift Date _____ Mean _____

Donor Gift Value _____

Millennium Code # _____

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Additional questions may be directed to Cleveland State University.

John N. Petrus, CPA, JD, Asst. VP Finance & Administration, Asst. Treasurer, CSU Foundation - 216.523.7240 (office), 216.687.9270 (fax)
Mary Kelly, Coordinator of Donor Records - 216.523.7291 (office), 216.687.9278 (fax)