

Stock Transfer Instructions

It's easy to give a gift of stock to Elizabethtown College. Please follow the instructions below.

If you are making the gift through your stockbroker, simply have your stock transferred into the College's account at Schwab. Your broker can wire the transfer directly into the Elizabethtown College account. What follows is information that your stockbroker will need for the transfer.

For transfers through Schwab:

DTC#: 0164

Code: 40

ACCT #: 74068392

FAO: Elizabethtown College

Should you need to contact our broker at Schwab, please call (800) 435-4000.

When your gift has been transferred, please notify Ben Goodhart, Director of Business Operations at Elizabethtown College. He can be reached by phone at 717-361-1218 or email at goodhartb@etown.edu. By notifying Ben of the transfer, we can watch for your gift to be sure that it is correctly credited to your account.

Elizabethtown College's Gift Acceptance Policy states that "stock gifts are valued in accordance with IRS guidelines at the mean average on the day in which the stock was received in Elizabethtown College's account (if electronically transferred) or the day of the postmark on the carrier envelope (if the stock is mailed).

If you are mailing the stock certificate directly to the College and the stock certificate is in YOUR NAME, we ask you to:

1. Send the *unendorsed certificate* via certified mail to:

Benjamin Goodhart

Director of Business Operations

Elizabethtown College

One Alpha Drive

Elizabethtown, PA 17022

2. Include a *Letter of Intent* with the certificates stating the designation of the gift.

3. *Under separate cover to the same address*, the donor should send (a.) an *Irrevocable Stock/bond Power*, also known as an "assignment separate from security" (the donor should sign the stock power, leaving the remainder blank), (b.) a signed *Deposit of Certificate Registered In Name Other Than That Of Customer*, which must be notarized, and (c.) a *copy of the Letter of Intent* which was enclosed with the certificates.

If the stock certificate is in YOUR NAME and it is delivered to the College by you or a courier you will need:

1. A *Letter of Intent* with the certificate stating the designation of the gift.
2. A signed and notarized *Deposit of Certificate Registered In Name Other Than That Of Customer*.
3. An **Irrevocable Stock/bond Power**, also known as an "assignment separate from security" (the donor should sign the stock power, leaving the remainder blank)

If you are giving stock and it is in the name of Elizabethtown College, all we need is the stock certificate and a signed letter stating your intent for the use of the gift.

If you have any further questions on how to make a gift of stock to the College, please contact Ben Goodhart, Director of Business Operations at 717-361-1218 or email at goodhartb@etown.edu.

The material presented on this Planned Giving website is not offered as legal or tax advice.