



SUNY New Paltz Foundation – Securities Transfer Request

Section I. This is a request to (please select one)

- I wish to donate shares of stock to the SUNY New Paltz Foundation (SNPF). Shares can be transferred directly from your brokerage account to SNPF's account. Please complete the form below in its entirety and send a copy or fax to your broker to initiate the transfer. A copy or fax of the form must be sent to the SUNY New Paltz Foundation Business Office at 845-257-4412. Please see our mailing address below.
- I wish to donate mutual funds or other types of financial instruments to the SUNY New Paltz Foundation. Please contact or ask your broker to contact the SUNY New Paltz Foundation Business Office at 845-257-3244 for further information.

Section II. Personal Information

Name _____

Home Address _____

City _____ State _____ Zip Code _____

If New Paltz Alumnus: Degree Year _____ School _____

Section III: Gift Information PLEASE BE SURE TO CONTACT YOUR BROKER TO INITIATE THE TRANSFER

Your Broker's Name _____ Broker's Telephone Number _____

Number of Shares _____ Security Name _____

Ticker Symbol (if known) _____ Gift Designation _____

Please accept this security transfer request as your authorization to transfer from account _____ to the SUNY New Paltz Foundation's account as follows:

Firm: Wells Fargo Advisors, Anthony Kaplan 845-483-7945
DTC: 0141
Customer Name: SUNY New Paltz Foundation Tax ID: 22-2141645
Account Number: 6090-8232
New Paltz Contact: Shannon Roddy, CFO 845-257-3244
SUNY New Paltz Foundation
1 Hawk Drive
New Paltz, NY 12561
roddys@newpaltz.edu
See delivery instructions on reverse

Signature(s) of account owner(s) _____

Please be sure that New Paltz is notified of the details of your stock gift to ensure proper acknowledgement of your gift. Please fax a copy of this transfer request form to us at 845-257-4412 or a copy can be mailed to 1 Hawk Drive New Paltz, NY 12561. Thank you!

Receiving Firm Information: FIRST CLEARING, LLC ONE NORTH JEFFERSON AVENUE ST. LOUIS, MO 63103	Tax ID Number: 23-2384840 - FCC Retail and IRA
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Delivery Instructions (All deliveries MUST include the client name and FCC account number.)

Wire Instructions	Wachovia Bank, N.A.*Roanoke VA ABA 051400548 Beneficiary: First Clearing, LLC Account # 5050000000631 Further Credit (Client Name & Full Account Number) *Wachovia Bank, N.A. is a banking affiliate of Wells Fargo & Company
All DTC Eligible Securities	DTC #: 0141 Client Name and Client Account Number
Physical Deliveries	FIRST CLEARING, LLC Attn: Physical Transfer - MO3960 One North Jefferson St. Louis, MO. 63103 Further Credit to Client Account Number
Book-Entry GNMA Securities – PTC Or Fed Book-Entry – Government Securities	BK of NYC/FCCORP. ABA# 021000018 Further Credit to Client Account Number
Euroclear Eligible Bonds (must notify Security Clearance 2 days prior to settlement)	EUROCLEAR #10665 Further Credit to Client Account Number
Foreign Equities: (must notify Security Clearance in order for them to instruct)	JPMorgan Chase Bank A/C # CHASGBZLST Account of First Clearing, LLC Further Credit to Client Account Number
Forward Checks* to the Address Indicated *Must include Client Name and WFA Account Number.	<input type="checkbox"/> FIRST CLEARING, LLC Attn: Cash Management – MO3940 One North Jefferson Avenue St. Louis, MO 63103 Further Credit to Client Account Number <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
ACAT Mutual Fund Registration Instructions - FCC IRA	FIRST CLEARING, LLC FBO: Client Name and Client Account Number One North Jefferson Avenue St. Louis, MO 63103
Mutual Fund Broker-Dealer	First Clearing, LLC