



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 845-257-3232 for further information. Mutual Funds may need to be sold prior to delivery.

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: M&T Bank/Wilmington Trust, Janine Otis, AVP | Wealth Client Administrator III 845-440-2845
DTC: #0990
Customer Name: SUNY New Paltz Foundation Tax ID: 22-2141645
Account Number: 136264-000
New Paltz Contact: Julia Davis, CFO 845-257-3232
SUNY New Paltz Foundation
1 Hawk Drive, New Paltz, NY 12561
davisj@newpaltz.edu

Signature of account owner Date
Signature of account owner Date

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, email Julia Davis at davisj@newpaltz.edu or a copy can be mailed to 1 Hawk Drive New Paltz, NY 12561. Thank you!