

Securities

Donor stock transfers are made in one of three ways:

- Electronically (DTC)
- Physical Certificate—Donor's Name
- Physical Certificate—UWF Foundation

NOTE: One of the following procedures must be used for each and every stock transfer. Following the procedures identified below will ensure that proper credit is given to the donor.

Electronic Transfer (DTC)

When donors' stocks are held by a broker, the donor instructs the broker to send a copy of confirmation to the UWF Foundation, indicating his or her name, the stock being transferred, and the date of transfer. The donor then follows up with a letter to the UWF Foundation with instructions regarding gift designation and instructs the broker to send the stock(s) to the UWF Foundation account:

Raymond James
Primary Contact: Mr. John D. Brewer
Assistant: Anna Schoor
Account # 26796723
DTC # 0725

Phone: (850) 439-2047 or (800) 347-7643
Fax: (850) 434-0060

NOTE: For proper gift credit, include the donor's name.

Physical Certificate—Donor's Name

When stocks are held by the donor and are registered in his or her name, the donor mails either a signed stock certificate or an unsigned stock certificate with a signed stock power (sent under separate cover). Then the donor prepares a letter authorizing the shares to be deposited into the UWF Foundation's brokerage account, stating gift designation. Mail letter, certificates, and stock power to:

The UWF Foundation, Inc.
Attn: Senior Accountant
11000 University Pkwy.
Pensacola, FL 32514

Physical Certificate—Naming the UWF Foundation

Stocks re-registered naming the UWF Foundation, Inc. Donor mails the stock certificate to:

The UWF Foundation, Inc.
Attn: Senior Accountant
11000 University Pkwy.
Pensacola, FL 32514