

## Electronic Stock Gift Transfer Form -- Gifts of Stock to UL Lafayette

To make a gift of stock (electronically) to the University of Louisiana at Lafayette (UL Lafayette) through its tax-exempt foundation (UL Lafayette Foundation, TAX ID # 72-6023836 – telephone 337-482-0700), please complete this form, sign and date the form, and give it to your broker. Finally, you or your broker should fax a copy to the UL Lafayette Office of Development (337-482-0932) or to the UL Lafayette Foundation (337) 482-0701.

### Donor Information

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Daytime Phone: (\_\_\_\_) \_\_\_\_\_  
UL Lafayette program and/or fund to which the gift should be credited: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Securities Being Donated

Name of Security: \_\_\_\_\_ Number of Shares: \_\_\_\_\_  
Name of Security: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

### Transferring (Donor's) Broker

Broker Name: \_\_\_\_\_ Telephone: (\_\_\_\_) \_\_\_\_\_  
Firm Name: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_

### Receiving (UL Lafayette Foundation's) Broker

Note: The following brokers have accounts to accept gifts of stock to the UL Lafayette Foundation for the benefit of UL Lafayette. If you have a preference as to where you would like your broker to transfer your gift of stock, please check-off the appropriate broker.

\_\_\_\_\_ UBS Financial Services  
Contact person: Ronald Peck  
Phone: (337) 234-5600  
Account name: UL Lafayette Foundation  
Account number: JT03051-01  
DTC number: 0279

\_\_\_\_\_ Wachovia Securities  
Contact person: Keith Fontenot  
Phone: (337) 233-0400  
Account name: UL Lafayette Foundation  
Account number: 84502675  
DTC number: 041

\_\_\_\_\_ Merrill Lynch  
Contact person: Tommy Kreamer  
Phone: (337) 265-2010  
Account name: UL Lafayette Foundation  
Account number: 516-07374  
DTC number: 5198

\_\_\_\_\_ Smith Barney/Citigroup  
Contact person: C. J. Stelly/Bill Pogue  
Phone: (337) 232-7160  
Account name: UL Lafayette Foundation  
Account number: 616-04988  
DTC number: 0418

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Fax this form to the UL Lafayette Office of Development (337-482-0932) or the UL Lafayette Foundation (337-482-0701). For questions, call the Office of Development at (337) 482-0922 or the UL Lafayette Foundation at (337) 482-0700. It is important that you or your broker notify us as soon as stock is transferred to our account so we can receipt & handle the stock according to your wishes.**