



SALISBURY UNIVERSITY  
FOUNDATION, INC.

For the Encouragement and Enrichment of Education at  
Salisbury University

## Instructions for Gifts of Securities

Salisbury University Foundation, Inc. is the affiliated foundation of Salisbury University. It accepts gifts of securities to be used exclusively to benefit Salisbury University, following the donor's wishes about the specific area of the university that is supported by the donation.

**These instructions will assist you in giving stock that is held by your broker or commercial banker to Salisbury University Foundation.**

1. Notify your broker or commercial banker that you are giving securities to Salisbury University Foundation. The stock should be transferred to Salisbury University Foundation's Charles Schwab account.

FBO: Charles Schwab & Co.

Bank: Citibank N.A., New York

Bank address: 399 Park Avenue, New York, NY 10022

DTC number: 0164

Account name: Salisbury University Foundation

Account number: 5545-1076

2. If you have any trouble with your transaction or need additional information, contact Deputy Director for Finance, Olesya Taylor, at [ontaylor@salisbury.edu](mailto:ontaylor@salisbury.edu) or 410-543-6392.

3. Finally, at the time of transfer, please contact Salisbury University Foundation Accounting at [SUFAccounting@salisbury.edu](mailto:SUFAccounting@salisbury.edu) with the donor's name, name of the stock, number of shares, and benefiting fund. Providing this important information will ensure donors are appropriately receipted and the proper SUF funds are credited.

If you have paper stock certificates that you wish to donate, please contact the Salisbury University Foundation, Inc. for further instructions.

If your gift will be used to establish an endowment, please contact our Advancement Office at (410) 677-0084 for additional information.

Federal Tax ID: **52-1127396**.

***Thank you for your support!***