UNIVERSITY of LOUISIANA LAFAYETTE | Foundation

POST OFFICE BOX 44290
LAFAYETTE, LOUISIANA 70504-4290

705 E. SAINT MARY BOULEVARD
LAFAYETTE, LOUISIANA 70503-2331

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

The University of Louisiana at Lafayette Foundation (Tax ID #72-6023836) is the primary tax-exempt entity through which charitable gifts to University of Louisiana at Lafayette are made. To make a gift of stock or marketable securities (electronic transfer) to the UL Lafayette Foundation, please complete this form, sign, date, and provide it to your broker. Also, please send a copy to the UL Lafayette Foundation via fax at (337) 482-0701 or email to Foundation@Louisiana.edu.

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. If you have a preference as to where you would like your broker to transfer your gift of stock, please check the appropriate box.

_____**UBS Financial Services**
Contact person: Traci Taylor
Phone: (225) 922-6907
Account name: UL Lafayette Foundation
Account number: OB 12079
DTC number: 0221

_____**Merrill Lynch Wealth Management**
Contact person: Jaime Fontenot
Phone: (337) 265-2033
Account name: UL Lafayette Foundation
Account number: 516-07374
DTC number: 8862

_____**Morgan Stanley Wealth Management**
Contact person: Andre Fontenot
Phone: (337) 267-2539
Account name: UL Lafayette Foundation
Account number: 402-125545-093
DTC number: 0015

Donor Signature: _____**Date:** _____

Should you have any additional instructions, please call the UL Lafayette Foundation Office at (337) 482-0700 or contact a member of our Development team at (337) 482-0922. It is important that you or your broker notify us as soon as stock is transferred account so we can receipt and process the stock transfer according to your wishes. Please note that brokerage fees may be incurred with stock gifts and should be taken into consideration when determining your gift amount. Thank you for your support to UL.

ULLF:stocktransfertemplate.07.2026