



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

The University of Louisiana at Lafayette Foundation (Tax ID #72-6023836) is the tax-exempt entity for the University of Louisiana at Lafayette. To make a gift of stock (electronic transfer) to the UL Lafayette Foundation, please complete this form, sign, date, and give it to your broker. Also, please fax a copy to the UL Lafayette Foundation at (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. 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

_____ **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

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

Donor Signature: _____ **Date:** _____

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

ULLF:stocktransfertemplate.01.2025