



Instructions

Step 1: You or your broker should call the JMU Foundation at (888) 303-9939 or (540) 568-3187 and share the stock gift information. Please email this form to jmuf@jmufoundation.org or FAX it to (540) 432-0373.

Step 2: Please advise your broker to direct the transfer of stock or mutual fund shares to the following account:

Janney Montgomery Scott, DTC #0374
Account #: 7025-2245
Account Name: James Madison University Foundation, Inc.
Attention: Michael Gochenour, Executive Vice President - Investments
313 Neff Avenue, Suite E
Harrisonburg, VA 22801
Toll-Free – 877-567-6778

Date:

Donor Information

Donor(s) Full Name:

Donor Phone:

Donor Address:

Donor Email Address:

Broker Information

Delivering Brokerage Firm:

Broker Name:

Broker Email Address:

Broker Phone:

Description of Gift

Security Name:

Security Symbol (if available):

Number of Shares:

Approximate Value:

To what area of the University would you like to designate your gift?

Expected date of transfer:

Please let us know if there is any further information that you may need in order to facilitate the transfer of stock or mutual funds.