



**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](mailto: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.