



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:

Wells Fargo Advisors, DTC #0141
Account #4465-1650
Account Name: James Madison University Foundation, Inc.
Attention:
T. Edgar Sipe, Managing Director - Investments
OR
Marshall F. Kiser, First Vice President, Investment Officer
2011 Evelyn Byrd Avenue
Harrisonburg, VA 22801

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.