

Instructions for Gift of Securities to NC State University

Thank you for your interest in making a gift of securities to the Osher Lifelong Learning Institute (OLLI) at NC State University. Please share the information below with your broker to facilitate your gift. While all gifts benefit the work of NC State, the specific account to which you direct your giving may differ, depending on the areas of the university you choose to support.

A gift to OLLI should be directed to the NC State University Foundation, Inc., OLLI Annual Giving.

Completing and returning this form to Advancement Services will help to ensure that your contributions are properly directed. In addition, please have your broker contact Advancement Services when the transfer of securities is complete. If you hold securities in certificate form, or if you have other questions, please contact Advancement Services:

Phone: 919-515-7827 • FAX: 919-513-2406 • Email: stockgifts@ncsu.edu

Note to Executors: If you are transferring securities held by an estate, please contact the Office of Gift Planning (919-515-5106 / giftplanning@ncsu.edu) for instructions to ensure compliance with North Carolina law, as delivery instructions may differ.

Broker Information: Except as noted below, all securities should be delivered to:

Charles Schwab & Co., Inc.
1958 Summit Park Drive, Suite 200
Orlando, FL 32810

DTC Number: 0164 Code 40
(cleared through Charles Schwab & Co., Inc.)

If you would like to support:

Your gift should be made to:

Account number:

Osher Lifelong Learning Institute

NC State University Foundation, Inc.

5789-0021

For gifts to the Wolfpack Club, or other areas of the University, different stock instructions may be required.

Delivering Brokerage Firm _____ Broker Name _____ Broker Telephone _____

Security Name _____ Security CUSIP/Ticker _____ Shares/Stocks _____ Par/Bonds _____

Donor Name _____ Donor Telephone _____

Donor Address _____ City _____ State _____ Zip Code _____

NC State University Foundation, Inc., OLLI Annual Giving
Gift Designation at NC State University

Updated 2/15/2017