

## STOCK TRANSFER INSTRUCTION SHEET

### IMPORTANT

1. Please complete this form and forward to your financial advisor.

2. Please also forward a copy of this form to Montgomery College Foundation at the address above or email. This form of communication is important in the gift receipt process, as donor information does not always transmit through the DTC wiring system.

If you have any questions, please contact Jonathan Strausberg at [Jonathan.Strausberg@montgomerycollege.edu](mailto:Jonathan.Strausberg@montgomerycollege.edu) or 240-567-4293.

**EIN: 52-1267008**

To (Donor's Financial Advisor) \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Please use this form as authorization to transfer the securities listed below from my account to the gift account of Montgomery College Foundation at Truist.

From (Donor Name) \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Name of Securities \_\_\_\_\_

Number of Shares \_\_\_\_\_

Gift Purpose \_\_\_\_\_

Signature and Date \_\_\_\_\_

### Securities Transfer Receiving Bank Information

For additional information on stock gifts to Montgomery College Foundation, please contact Jonathan Strausberg at [Jonathan.Strausberg@montgomerycollege.edu](mailto:Jonathan.Strausberg@montgomerycollege.edu) or 240-567-4293

**Account Name:** Montgomery College Foundation  
**DTC:** #2039 SEI Private Trust Co FFC Truist Bank

Truist Bank  
303 Peachtree Street, N.E.  
15th Floor, Suite 1520  
Atlanta, GA 30308  
Email: [TruistBankGiftClearing@Truist.com](mailto:TruistBankGiftClearing@Truist.com)  
Phone numbers: 404-724-3556 or 404-588-8296

### IMPORTANT

For proper donor recognition, transfers must include the following information:

- Donor's name and address
- Name of security and number of shares
- Purpose of gift