

Electronic Stock Gift Transfer Form -- Gifts of Stock to UL Lafayette

To make a gift of stock (electronically) to the University of Louisiana at Lafayette (UL Lafayette) through its tax-exempt foundation (UL Lafayette Foundation, TAX ID # 72-6023836 – telephone 337-482-0700), please complete this form, sign and date the form, and give it to your broker. Finally, you or your broker should fax a copy to the UL Lafayette Office of Development (337-482-0932) or to the UL Lafayette Foundation (337-482-0701).

Donor Information

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Daytime Phone: (_____) _____
UL Lafayette program and/or fund to which the gift should be credited: _____

Securities Being Donated

Name of Security: _____ Number of Shares: _____
Name of Security: _____ Number of Shares: _____

Transferring (Donor's) Broker

Broker Name: _____ Telephone: (_____) _____
Firm Name: _____ City: _____ State: _____

Receiving (UL Lafayette Foundation's) Broker

Note: The following brokers have accounts to accept gifts of stock to the UL Lafayette Foundation for the benefit of UL Lafayette. If you have a preference as to where you would like your broker to transfer your gift of stock, please check-off the appropriate broker.

_____ UBS Financial Services
Contact person: John Boudreaux
Phone: (337) 234-5600
Account name: UL Lafayette Foundation
Account number: JT03051-01
DTC number: 0279

_____ Wells Fargo Advisors (Wachovia)
Contact person: Keith Fontenot
Phone: (337) 233-0400
Account name: UL Lafayette Foundation
Account number: 84502675
DTC number: 041

_____ Merrill Lynch
Contact person: Tommy Kreamer/Kevin Hebert
Phone: (337) 265-2010
Account name: UL Lafayette Foundation
Account number: 516-07374
DTC number: 5198

_____ Morgan Stanley Smith Barney
Contact person: Bill Pogue
Phone: (337) 232-7160
Account name: UL Lafayette Foundation
Account number: 616-04988
DTC number: 0418

Donor Signature: _____ **Date:** _____

Fax this form to the UL Lafayette Office of Development (337-482-0932) or the UL Lafayette Foundation (337-482-0701). For questions, call the Office of Development at (337) 482-0922 or the UL Lafayette Foundation at (337) 482-0700. It is important that you or your broker notify us as soon as stock is transferred to our account so we can receipt & handle the stock according to your wishes.