A gift of securities is considered to be completed on the "date of delivery" (when the stock is in a Lafayette brokerage account, or on the postmark date, if mailed), which determines the value of the gift. Contact Jessy Rutz at (610) 330-5046 or rutzj@lafayette.edu for more information.

NOTE: If you are funding a life income agreement, please contact the Estate Planned Giving Office at 610-330-5892 for different instructions.

1. **Securities**
   PLEASE NOTIFY THE DEVELOPMENT OFFICE BEFORE TRANSFERRING/MAILING STOCK CERTIFICATES BY CALLING 610-330-5046.

   A. **Securities Held in a Broker or Bank Account** – see Security Transfer Form
      Complete the “General Security Transfer Form” and mail or fax it to your broker/bank. Fax a copy to Lafayette College at (610) 330-5928 or email to Jessy Rutz at rutzj@lafayette.edu. Please include where you would like to direct your gift on the form.

   B. **Security Certificate Held by Donor**
      A letter should accompany the stock certificate(s) with instructions on the use of the gift. DO NOT endorse the certificate(s). Instead, endorse the Stock Power(s) and mail it/them in a separate envelope. *Please note that a Medallion Signature Guarantee is required on the Stock Power.* This is a stamp provided by your financial institution when your signature is verified. Both mailings should be sent to:

      Lafayette College
      Development Office
      307 Markle Hall
      Easton, PA 18042-1774

   C. **Mutual Funds**
      Please contact Stephanie A. Hayes ’94, Director of Advancement Services, at 610-330-5929 or hayess@lafayette.edu to coordinate delivery.
DONOR INSTRUCTIONS TO BROKER/BANK
Important: To insure proper credit for your gift, please mail a copy of the instructions given to your broker/bank to:
Lafayette College, Development Office, 307 Markle Hall, Easton, PA 18042-1774 or fax to: (610) 330-5928.

Name of Broker: ____________________________________________________________

Firm Name: ________________________________________________________________

Firm Address: ______________________________________________________________
   Street
   City                                                                            State                                   Zip

Broker Phone Number: ___________________________   Fax Number: ______________________

Name of Donor(s): _____________________________________________________________

Donor Phone Number: ___________________________   Fax Number: ______________________

Donor Address: ______________________________________________________________
   Street
   City                                                                             State                                  Zip

I hereby authorize you to transfer the following securities from my account:

Donor Brokerage Account Number: ______________________________________________

Number of Shares & Security Name:                      Date Acquired (if known):
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

The designation or purpose of this gift is as follows:
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

____________________________________________________ __________________
(Signature of Donor)      (Date)

____________________________________________________ __________________
(Signature of Joint Donor if applicable)                                     (Date)

BROKER INSTRUCTIONS

Please transfer these securities using the following instructions:

DTC Eligible Securities: Pershing, LLC   DTC # 0443   ID Agent Bank # 00443
Account #: N7M100236   Account Name: Lafayette College   Fax #: (412) 236-4929

Fed Eligible Securities: ABA# 021-000-018   Bank of NY/Pershing
For Credit to account #: N7M100236   Client account name: Lafayette College