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 Stephanie A. Hayes '94 at (610) 330-5929 or hayess@lafayette.edu or Leah Heinrich at (610) 330-4407 or heinricl@lafayette.edu for more information.

NOTE: If you are funding a life income agreement, please contact Joe Samaritano with the Planned Giving Office at 610-330-5047 or samaritj@lafayette.edu for different instructions.

1. **Securities**
   PLEASE NOTIFY THE DEVELOPMENT OFFICE BEFORE TRANSFERRING/MAILING STOCK CERTIFICATES BY CALLING 610-330-5929.

   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 Leah Heinrich at heinricl@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, Executive Director of Campaign and Development Operations, 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