

INSTRUCTIONS FOR STOCK TRANSFERS

The Marshall University Foundation Inc.
519 John Marshall Drive
Huntington, WV 25703
Contacts: Scott Anderson, CFO, phone: 304-696-3388
Lee Graham, Finance Manager, phone: 304-696-6297

Stock Transfers:

Donors may request their brokers transfer securities to the account of the Marshall University Foundation listed below:

Morgan Stanley Smith Barney for the Marshall University Foundation
Account number: 808-108158-710-100
DTC: 0015

*In order for the donor to receive proper recognition credit, please fax (304) 696-3541 or email lee.graham@marshall.edu or anderson119@marshall.edu the following information: Donor name, security name, number of shares and the transfer date. The gift designation information will also be required.

Note

In accordance with IRS regulations, a gift to the Foundation of a DTC'd security or properly endorsed stock certificate (or stock certificate and stock power) is completed on the date of mailing or delivery to the Foundation or the Foundation's agent. This date will be used to internally establish the value of the gift.

Donors should consult their tax advisor about the deductibility of their gift.

It is very important to identify the company account number and the applicable routing number.

For ACH delivery:

Bank Routing Number: 044000037
Account Number: 800226211
Account Name: The Marshall University Foundation Inc.

For Wire Transfers:

Bank Routing Number: 021000021
SWIFT Code: CHASUS33
General Bank Reference Address: JPMorgan Chase New York, NY 10017
Account Number: 800226211
Account Name: The Marshall University Foundation Inc.