

## ELECTRONIC TRANSFER OF STOCK

Thank you for your recent inquiry about gifts of stock to Marquette University. Making a gift of stock to Marquette is a relatively simple process.

First, you will need to instruct your broker to electronically transfer the stock to Marquette's account at either Wells Fargo Advisors, LLC or UBS Financial Services. Your broker will need the following information to complete the transfer:

### **I. Gifts of Securities (above \$100,000)**

Broker: Wells Fargo Advisors, LLC  
1270 Westhill Blvd.  
Appleton, WI 54914  
Account Representative: Mike Ferris (920) 731-3141 (800) 545-3141  
DTC Number: 141  
Marquette Account Number: 6J 6J04-5229-6067  
Beneficiary: Marquette University

### **II. Gifts of Securities (below \$100,000)\***

Broker: UBS Financial Services  
17775 W. Bluemound Road  
Brookfield, WI 53045  
Account Representative: Stephanie Sargent (262) 794-0859  
DTC Number: 0221  
Marquette Account Number: B6-34284  
Beneficiary: Marquette University

*\* For gifts of securities used to fund a trust or to contribute to an existing trust, please contact the Treasury Office for further instructions.*

After you instruct your broker to make the stock transfer, we ask that you write or call us to let us know of the gift. Unfortunately, when securities are transferred electronically, the donor's name is not always included in the transfer information. By letting us know of your gift, we will be able to properly match the stock that we received with your gift record. Please call or write us with the following information:

- Name of stock transferred
- Number of shares
- Brokerage firm stock transferred from
- Approximate date of transfer
- How you would like the gift used at Marquette University

For further information please contact:

Teng Vang  
Marquette University Marquette University  
Director of Treasury Services  
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(414) 288-6600 fax  
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