

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 (\$100,000 and above)

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: 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:

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