

How to Give Stock to Chapman University

Electronic Transfer

- Notify your broker that you would like to make a gift of stock to Chapman University and have your broker contact Chapman's broker:
Leah D. Nakamura
Wells Fargo Securities
(213) 253-6205
leah.d.nakamura@wellsfargo.com
- Your broker will need Chapman's Account:
Number # 1AB45467
DTC # 2072
Agent Bank # 52196
Institution # 66842
- The date of the gift is the date the shares are received into Chapman's account.
- See page two for direct transfer information and the **Stock Transfer Form**.

Stock Certificates

- Mail via registered mail or hand-deliver unendorsed certificates directly to the Office of University Advancement, along with a cover letter signed by all donors listed on the certificate.
- In a separate envelope, include a signed stock power form, which can be obtained from your bank or from the Office of University Advancement.
- The date of the gift is the postmark date on the certificates.

Valuation

- The value of the gift is the average of the high and low on the date the stock is transferred.

For questions about making a gift of stock please contact the Office of University Advancement at (714) 744-7623.

Also available:

- Wire Transfer Instructions (EFT)
- How to Transfer Mutual Funds to Chapman University

Thank you for your support of Chapman University.

Stock Transfer Form

FROM: Name _____
Address _____
City, St, ZIP _____
Phone _____
Date _____

TO: Broker's Name _____
Brokerage _____
Phone _____
Fax _____

Please transfer to Chapman University:

Name of Stock _____
Amount _____
Designation _____

Signature: _____

Stocks may be transferred to Chapman through their broker:

Leah D. Nakamura
Wells Fargo Securities
(213) 253-6205
Account # 1AB45467
DTC # 2072

Agent Bank # 52196
Institution # 66842

If you have any questions, please contact the Office of Financial Services at (714) 997-6944 or the Office of University Advancement at (714) 744-7623.

cc: Office of University Advancement, Chapman University
One University Drive, Orange, California 92866
Fax (714) 532-6063 – C/O Office of Financial Services