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:
  Patricia Hawkins
  Wells Fargo Securities
  (213) 253-7312
  hawkinpb@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) 628-2814.

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:
  Patricia Hawkins  
  Wells Fargo Securities  
  (213) 253-7312  
  Account # 1AB45467  
  DTC 2072

If you have any questions please contact the Office of Financial Services at (714) 997-6699 or the Office of University Advancement at (714) 628-2814.

cc:  Office of University Advancement, Chapman University  
One University Drive, Orange, California 92866  
Fax (714) 997-6988