



**Information Form  
Charitable Gifts of Stock**

***Donor Identification:***

Legal Name \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Spouse \_\_\_\_\_ Phone: \_\_\_\_\_

Mailing Address \_\_\_\_\_ Fax: \_\_\_\_\_

***Brokerage Firm:***

Company \_\_\_\_\_ Phone: \_\_\_\_\_

Account Manager \_\_\_\_\_ Fax: \_\_\_\_\_

***Gift Information:***

Name of Stock \_\_\_\_\_

Designation \_\_\_\_\_

***Taylor Contact:***

Director of Donor Services: Laura Key – [lrkey@taylor.edu](mailto:lrkey@taylor.edu)  
Phone: 765-998-5310 or 800-882-3456 x5310

or

Staff Accountant: Susan Durovey-Antrim – [ssdurovey@taylor.edu](mailto:ssdurovey@taylor.edu)  
Phone: 765-998-5122

Taylor University's DTC Number: 0057

Taylor University's Account Number: 411-21487

Taylor University Federal EIN: 35-0868181

Fax: 765-998-4799

Broker: Scott Adams - 765-603-7254 – [scadams@taylor.edu](mailto:scadams@taylor.edu)

or

Edward Jones  
5820 S Williamson Blvd Ste 5B  
Port Orange, FL 32128

***Development Representative:*** \_\_\_\_\_

TAYLOR UNIVERSITY  
236 W. Reade Avenue, Upland, IN 46989  
1-800-882-3456  
FAX: 1-765-998-4857 [lrkey@taylor.edu](mailto:lrkey@taylor.edu)

If you are considering a gift of stock to Taylor University, please mail, scan and email or fax this completed form or contact Laura Key or a Development representative to expedite the process. Thank you.

## CHARITABLE GIFTS OF STOCK REQUIRING A BROKERAGE TRANSFER

The following procedures outline how a donor may use the current market value of stocks held in his or her brokerage account for a charitable gift to Taylor University.

1. Inform a Taylor University Development officer of your intent to make a charitable gift to Taylor University from stock that is currently held in your brokerage account.
2. Complete and send the Information Form (on reverse side) to Laura Key, Director of Donor Services, Taylor University, 236 West Reade Avenue, Upland, Indiana 46989.
3. Call or email Laura Key, Director of Donor Services and alert her of your stock gift to Taylor with the quantity and type of stock to be transferred, approximate date of transfer and how your gift should be designated or
4. Ask your broker to inform Taylor University of the (1) donor's name, (2) name of the company whose stock the donor is transferring to Taylor University. (3) quantity of stocks transferred (4) date of the transfer and (5) how the donor would like the gift designated.

## GIFTS OF PERSONALLY HELD STOCK

The following procedures outline how a donor may use the current market value of personally held stock for a charitable gift to Taylor University.

1. Inform a Taylor University Development officer of your intent to make a charitable gift of personally held stock to Taylor University.
2. Complete and mail or fax the Information Form (above) to Laura Key, Director of Donor Services, Taylor University, 236 West Reade Avenue, Upland, Indiana 46989.
3. Complete a **Disclaimer Form** (available from either your stockbroker or from Taylor's) to transfer the ownership of personally held stock from you to Taylor University. This **Disclaimer Form** will certify (1) the legal name of the donor, (2) the name of the company whose stock is being transferred, (3) the quantity of stock being transferred and (4) the date on which the stock was transferred.
4. Sign and notarize the **Disclaimer Form** and mail it by **CERTIFIED MAIL** to Taylor University (see above for address).
5. Mail the personally held **Stock Certificates** by **CERTIFIED MAIL** to Taylor University (see above for address). To avoid the possibility of theft, stock certificates should be mailed separate from the Disclaimer Form.