



## SUNY New Paltz Foundation – Securities Transfer Request

### Section I. This is a request to (please select one)

- I wish to donate shares of stock to the SUNY New Paltz Foundation (SNPF). Shares can be transferred directly from your brokerage account to SNPF's account. Please complete the form below in its entirety and send a copy or fax to your broker to initiate the transfer. **A copy or fax of the form must be sent to the SUNY New Paltz Foundation Business Office at 845-257-4412. Please see our mailing address below.**
- I wish to donate mutual funds or other types of financial instruments to the SUNY New Paltz Foundation. Please contact or ask your broker to contact the SUNY New Paltz Foundation Business Office at 845-257-3964 for further information. Mutual Funds may need to be sold prior to delivery.

### Section II. Personal Information

Name \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

If New Paltz Alumnus: Degree Year \_\_\_\_\_ School \_\_\_\_\_

### Section III: Gift Information PLEASE BE SURE TO CONTACT YOUR BROKER TO INITIATE THE TRANSFER

Your Broker's Name \_\_\_\_\_ Broker's Telephone Number \_\_\_\_\_

Number of Shares \_\_\_\_\_ Security Name \_\_\_\_\_

Ticker Symbol (if known) \_\_\_\_\_ Gift Designation \_\_\_\_\_

Please accept this security transfer request as your authorization to transfer from account # \_\_\_\_\_ to the SUNY New Paltz Foundation's account as follows:

Firm:	M&T Bank/Wilmington Trust, Sarine Babikian, Senior Associate 332-268-5274	
DTC:	#0990	
Routing No.:	031100092	
Customer Name:	SUNY New Paltz Foundation, Inc.	Tax ID: 22-2141645
Account Number:	136264-000	
New Paltz Contact:	Lisa Blume-Hartwell 845-257-3964	
	SUNY New Paltz Foundation, Inc.	
	1 Hawk Drive, New Paltz, NY 12561	
	blumel@newpaltz.edu	

Signature of account owner \_\_\_\_\_ Date \_\_\_\_\_

Signature of account owner \_\_\_\_\_ Date \_\_\_\_\_

Please be sure that New Paltz is notified of the details of your stock gift to ensure proper acknowledgement of your gift. **Please email a copy of this transfer request form to Lisa Blume-Hartwell at [blumel@newpaltz.edu](mailto:blumel@newpaltz.edu) or a copy can be mailed to 1 Hawk Drive New Paltz, NY 12561.** Thank you!