



**Instructions**

**Step 1:** You or your broker should call the JMU Foundation at (888) 303-9939 or (540) 568-3187 and share the stock gift information. Please email this form to [jmuf@jmufoundation.org](mailto:jmuf@jmufoundation.org) or FAX it to (540) 432-0373.

**Step 2:** Please advise your broker to direct the transfer of stock or mutual fund shares to the following account:

Wells Fargo Advisors, DTC #0141  
 Account #4465-1650  
 Account Name: James Madison University Foundation, Inc.  
 Attention:  
 T. Edgar Sipe, Managing Director - Investments  
 OR  
 Marshall F. Kiser, First Vice President, Investment Officer  
 2011 Evelyn Byrd Avenue  
 P.O. Box 1187  
 Harrisonburg, VA 22801

**Date:**

**Donor Information**

Donor(s) Full Name:	Donor Phone:
Donor Address:	Donor Email Address:

**Broker Information**

Delivering Brokerage Firm:	Broker Name:
Broker Email Address:	Broker Phone:

**Description of Gift**

Security Name:	Security Symbol (if available):
Number of Shares:	Approximate Value:

To what area of the University would you like to designate your gift?

Expected date of transfer:

Please let us know if there is any further information that you may need in order to facilitate the transfer of stock or mutual funds.