



## **GIFTS OF STOCK**

**For paper certificates** (*for electronic transfer, please see below*): to complete a gift of shares for which a donor holds a valid certificate, please send the **unendorsed** certificate(s) via certified U.S. Mail\* to:

University of the Incarnate Word (US Federal EIN: 74-1109661)  
Office of Institutional Advancement  
4301 Broadway, CPO 309  
San Antonio, TX 78209  
ATTN: Diane Echavarria, Director of Major Gifts and Planned Giving

Prior to doing so, the owner(s) of the shares must sign a copy of the below stock power form, signing their name(s) as they appear on the certificate. Then, the donor's signature must be **guaranteed** (Gold Medallion Guarantee preferred) by any bank or brokerage.

The completed stock power form should then be mailed via ordinary first-class mail to UIW at the above address, ***using a separate envelope*** from that used to mail the stock certificate(s). One completed stock power form is required for each different corporation whose shares are being contributed; multiple certificates for a single corporation require only a single stock power form. The donor should not write anything on the stock power form other than his/her/their signature and the signature guarantee. Certificates and stock power forms may also be hand-delivered to the University of the Incarnate Word, Office of Institutional Advancement. The Office of Institutional Advancement is located on the second floor of the Buckley-Mitchell Building on the UIW campus.

**For electronic transfers of stock**, donors should contact their personal brokerage and direct that shares be transferred to UIW. Please call (210) 829-6071 to let us know that you are transferring the stock. Below is the information necessary for the completion of this type of electronic transaction:

**UIW Brokerage: Merrill Lynch**  
**UIW Account Number: 592-04161**  
**DTC Number: 5198**  
**Attention: Anna Femat**  
**Telephone: (210) 805-2817**

*\* Please note: when stock certificates are sent via the U.S. Postal Service to UIW, the date of gift for tax purposes is defined by IRS Publication 561 as the postmark date used to mail the shares. However, if any other delivery service is utilized, the date of the gift is further defined as being the date on which the shares irrevocably arrive at UIW and/or are received by UIW via authorized signature.*

**IRREVOCABLE STOCK POWER**

For value received, \_\_\_\_\_

Hereby sell, assign and transfer unto \_\_\_\_\_

\_\_\_\_\_

(     ) shares of the \_\_\_\_\_  
Capital stock of the \_\_\_\_\_

standing in \_\_\_\_\_ name on the book of said  
\_\_\_\_\_ represented by Certificate Number \_\_\_\_\_

herewith and do hereby irrevocably constitute and appoint \_\_\_\_\_

\_\_\_\_\_ Attorney to transfer the said stock on the books of the within named Company with full power of substitution in the premises.

Dated: \_\_\_\_\_

Donor Signature: \_\_\_\_\_

Donor Signature: \_\_\_\_\_

Attest: \_\_\_\_\_ Attest Date: \_\_\_\_\_