



## Gift of Security Transfer Notification Form

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Florida Polytechnic University Foundation accepts gifts of securities in support of our mission. When working with your broker on gifts of securities, please use this form as a guide to assist us in processing your gift to Florida Polytechnic Foundation. Federal privacy statutes may prevent your broker from providing us with any personal information, including your name. This form assists us in ensuring we accurately direct the donor's proceeds to support Florida Polytechnic University.

Provide your broker with the following information to request specific transfer instructions:

Florida Polytechnic University Foundation  
Kathy Bowman, Foundation CEO (863) 874-8674  
4550 Polytechnic Circle  
Lakeland, FL 33805  
[kbowman@floridapoly.edu](mailto:kbowman@floridapoly.edu)

### Donor Information

Name \_\_\_\_\_  
Street address \_\_\_\_\_  
City \_\_\_\_\_  
State \_\_\_\_\_ Zip code \_\_\_\_\_  
Telephone \_\_\_\_\_  
Email \_\_\_\_\_

### Broker Information

Brokerage firm \_\_\_\_\_  
Broker name \_\_\_\_\_  
Broker phone \_\_\_\_\_ Broker fax \_\_\_\_\_

### Transfer of Securities Information

Anticipated date of transfer \_\_\_\_\_



## Delivery Instructions

### All DTC-Eligible Securities (e.g., stocks):

Deliver to DTC Clearing 0164, Code 40

Account Name: Florida Polytechnic University Foundation, Inc. Donation Account

Account Number: xxxx-8936

Description of securities being transferred: (Indicate the name of each security, the number of shares, and the approximate dollar value)

Designation of gift: (If the gift is to be split amount accounts, also note how many shares or dollars for each designation)

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**Please print and mail or electronically send this form to:**

Florida Polytechnic University Foundation, Inc.  
Attn: Kathleen Bowman, CEO  
4550 Polytechnic Circle, Lakeland, FL 33805 or  
[Foundation@floridapoly.edu](mailto:Foundation@floridapoly.edu)

If you have questions, please call us at (863) 874-8700.