



Gift of Security Transfer Notification Form

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
4700 Research Way
Lakeland, FL 33805
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)

Please print and mail or electronically send this form to:

Florida Polytechnic University Foundation, Inc.
Attn: Kathleen Bowman, CEO
4700 Research Way, Lakeland, FL 33805 or
Foundation@floridapoly.edu

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