Instructions for Gifting Stock to Earlham College

Stock Held in a Brokerage Account

1. Ask your broker to wire transfer your stock gift by DTC to the Earlham College account at Fidelity.
   Fidelity in Indianapolis, IN: DTC #0226
   Account Name: Earlham College
   Account Number: Z49855685
   
   Our broker at Fidelity is Steve Tozer. He can be reached at 800-343-2575 ext. 50555.

2. Donor information is not included with the transfer, so please inform April Warner (warneap@earlham.edu or 765-983-1637) of the name and number of shares you are transferring and how you would like the gift to be used.

3. We value your gift for our records at the average of the high and low on the day it is received into our account. An acknowledgment letter will be sent to you by mail, confirming receipt and designation of your gift.

Stock Certificates Held by You

Items you will need:
- Stock certificate – do not fill out the endorsement or assignment – leave stock certificate blank.
- Brief letter detailing the number of shares, name of company, and purpose of your gift.
- Irrevocable Stock or Bond Power – see next page for instructions
- Certificate Release Request – requires signature guarantee – see next page for instructions. Both forms are available in a fillable pdf format on our website at earlham.edu/stock-gift.

In separate envelopes, send:
   1. Envelope one: Stock certificate and description letter

Send these both by registered, first class mail to our office:

Earlham College
Attn: April Warner, drawer 193
Institutional Advancement
801 National Road West
Richmond, IN 47374

Stock gifts sent to us by first class mail are valued for our records at the average of the high and low on the date of the later postmark of the two envelopes received. An acknowledgment letter will be sent to you by mail, confirming receipt and designation of your gift.
Instructions for completing Irrevocable Stock or Bond Power form:

Account Number: Z49855685

Your name EXACTLY as it appears on the stock certificate

Sign

Instructions for completing Certificate Release Request:

Fill in Earlham's account information

Fill in with information from the stock certificate.

Signature with signature guarantee required.