SECURITIES/STOCK TRANSFER INSTRUCTIONS

Securities Transfer Information
Transferring appreciated stock or mutual funds can increase the value of your gift, benefiting both you and Maryville College. You can avoid capital gains taxes and deduct the full market value of the stock on the date the securities are transferred to the College.

Step 1: Please notify the College of your intentions
It is important that the Office of Advancement receive information about the gift to provide proper and timely gift credit. Please notify Darla Kaufman at (865) 981-8196 or darla.kaufman@maryvillecollege.edu.

Please provide:
• Name of donor(s)
• Number of shares and name of security
• Name of brokerage firm and contact person there
• Intended transfer date
• Your intended designation for the gift

Step 2: Transfer of securities
 Marketable securities held in a brokerage or trust account can be transferred electronically through the Depository Trust Company (DTC) institutional delivery (ID) system, which places the stock directly into a custodial account maintained by the College through PYA Waltman/JP Morgan Chase, NY. For the donor’s information, the valuation of the gift is calculated as the mean price (high-low average) of the securities as traded on the date they are transferred to a Maryville College account.

Information your broker or bank official may need:
• Participant Number DTC Clearing: 0226 (DTC#)
• Deliver nonnegotiable securities to:
  National Financial Services LLC
  499 Washington Blvd – Fifth Floor
  Jersey City, NJ 07310
• JP Morgan Chase/NFSC
• ABA number: 021-000-021
• Maryville College: 676-380993

BROKERAGE WIRING: (Wire to)
• JP Morgan Chase, NY
• ABA number: 021-000-021
• For Credit to: National Financial Services LLC
• NFS Account # 066196-221
• FBO: Maryville College 676-380993 (include contribution type on IRAs)

You may also contact April Smith @ asmith@pyawaltman.com or Amy Gattis at agattis@pyawaltman.com. They can both be reached at (865) 693-6301.

Thank you for supporting Maryville College!