

## How to give securities

**IMPORTANT NOTE: If you plan to give mutual funds, please follow the “How to give mutual funds” instructions or call our securities gift team at 785-775-2114 for instruction. Mutual funds cannot be transferred successfully using the routing information below.**

Giving securities is a great and easy way to support K-State. Our team utilizes the universal electronic transfer method of the Deposit Trust Company (or DTC) to execute these transactions. DTC is the fastest and most secure method for donating securities, and can be completed in two steps.

- 1. Please notify the KSU Foundation of your intention to donate securities prior to initiating the transfer of securities.** Prior notification is critical to identifying your gift of securities, as donor information does not always transmit through the DTC system. Please reach out to our team at [SecuritiesGifts@ksufoundation.org](mailto:SecuritiesGifts@ksufoundation.org) or via fax at 785-775-2220. For your convenience we have provided a template for this written communication on the next page labeled “Sample Letter to the KSU Foundation.”
- 2. Contact your financial institution about your intention and provide them with the following instructions to initiate the transfer to our account with United Missouri Bank:**

Deliver to institution:	United Missouri Bank
DTC #:	2450
Account#:	114179.2 ( <b>Note:</b> there is a period in our account number)
Account name:	Kansas State University Foundation
Your name (reference):	[Your name here]*

*\*In order to more easily pinpoint your gift, please have your financial institution include your name in the reference section of the transfer instruction.*

**If your financial institution requires this communication in writing, please see the “Sample letter to broker” on the last page of this document.**

Once the trade has been initiated it will take 1–2 business days for it to settle into our account. After such time, our team can value the gift using the mean price of the settlement date. Our gift processing team will then be in contact to provide you with a receipt showing the value of your gift and how it was allocated. If you have any questions at any time in the process please call our team at 785-775-2114 or contact us via email at [SecuritiesGifts@ksufoundation.org](mailto:SecuritiesGifts@ksufoundation.org).

## How to give securities

Continued

### Sample letter to the KSU Foundation

[Date]

Kansas State University Foundation  
1800 Kimball Ave. Ste. 200  
Manhattan, KS 66502-3373

Attn: Investment Accounting

I have authorized the transfer of \_\_\_\_\_ shares of \_\_\_\_\_ stock from account #\_\_\_\_\_ with \_\_\_\_\_ (name of agent, name of company, city, state, telephone) to the Kansas State University Foundation account with United Missouri Bank per the stock transfer instructions.

I am designating this gift of stock for a(n) \_\_\_\_\_ (i.e. outright gift, charitable remainder trust, charitable gift annuity, etc.) to \_\_\_\_\_ (name of fund/s) in the College of \_\_\_\_\_.

Sincerely,

[Donor's name and address]

### Sample letter to broker

[Date]

[Company name and address]

Attn: Financial Adviser Name

Dear [name of financial adviser]:

With this letter I am instructing you to transfer shares of stock from account #\_\_\_\_\_ to the Kansas State University Foundation per the following instructions:

United Missouri Bank, Attn: Brenda McIntosh  
DTC #2450 -Agent & Institution #28825  
For credit to: #114179.2/Kansas State University Foundation  
Reference: [donor's name]

Sincerely,

[Donor's name and address]

## Transferring securities and mutual funds to the KSU Foundation

Thank you for considering making a gift to the KSU Foundation using securities. Many donors find this giving vehicle to be easy and impactful. Below you will find information on how to make this gift. If you need anything further please reach out to us.

**Our federal tax ID number is: 48-0667209.**

### Securities

United Missouri Bank

DTC #2450

For credit to: #114179.2/Kansas State University Foundation

Reference: (Donor's Name)

### Mutual funds

Stifel Financial, Attn: Gregory Barron

DTC #0793

For credit to: #18795329/Kansas State University Foundation

Reference: (Donor's Name)

### Stifel contacts:

Office number: 785-776-1066

#### Greg Barron

Email: [BarronG@stifel.com](mailto:BarronG@stifel.com)

#### Derek Haller

Email: [hallerd@stifel.com](mailto:hallerd@stifel.com)