



## **How to Transfer Stock to Pacific University**

Marketable securities held in a donor's brokerage or trust account may be transferred to Pacific University using the following process. Pacific thanks you for choosing to support its students and programs with a gift of securities.

Transfers of securities for the benefit of Pacific University should be made through the donor's broker to:

Account in the name of: PACIFIC UNIVERSITY - DONOR FUND ACCT

Account number: B19134000

All Depository Trust Company-eligible  
free transactions should be directed to:

JP Morgan Chase Bank, N.A.

DTC Participant Number 902

Credit Account Number - P72500

FFC Account Number - B19134000

FFC Account of - PACIFIC UNIVERSITY - DONOR FUND ACCT

Upon notice of the transfer, JP Morgan Chase will notify Pacific University of the completed transaction. The valuation of the gift will be calculated for the average of the high and low price for the day of transfer to the University's holding account.

The donor should provide her/his broker with the following delivery instructions for the transaction:

- \* Name of security to be transferred
- \* Number of shares to be transferred
- \* Uses and purposes of the gift

Prior to the time of the transfer, please call or email Jan Stricklin, Associate Vice President for Advancement at 503-352-2890 or [jstricklin@pacificu.edu](mailto:jstricklin@pacificu.edu)

Please provide:

- \* Name of donor(s)
- \* Number of shares and name of security
- \* Intended transfer date
- \* Donor's intended use of gift

This information will ensure that the donor's wishes are carried out and that Pacific's records are complete.