

Stock Transfer Instructions

In order to make a gift of stocks to Ferrum College, please provide the following information to your stock broker. Your broker will be able to process the stock gift with this information and contact the Advancement Office at Ferrum College **and** Patrick Wales at Truist Investment Services regarding any questions. Patrick manages all gifts of stock received by Ferrum College.

Bank -- National Financial Services - Danville, VA

Phone -- 800-476-0587 or 434-799-1000

Account # -- WA7-056197

DTC # -- #0226

Ferrum College Tax ID -- 54-0506457

Contact:

Patrick Wales

Financial Advisor / Private Client Group

Truist Investment Services, Inc. / Truist Advisory Services, Inc.

Danville, VA

Office: 434.799.1000 / Fax: 434.799.3623

pwales@truist.com

When transferring stock to Ferrum College, please request that your broker do the following:

- Send an email to Patrick Wales (pwales@truist.com) and Ferrum College's Advancement Office (advancement@ferrum.edu) with the information listed below. Because donor names are often not included, it is VERY important that you notify Ferrum College's Advancement Office of the transfer.
 - Donor name
 - Donor address
 - Security or stock being transferred
 - Number of shares
 - Date of transfer
 - Donor intent for how the gift proceeds should be used
- Attach a trailer to the transfer stating **your name and desired fund or area to which your gift should be designated.**

Patrick will facilitate the sale of the stocks within 24 hours of transfer and send the gift transmittal to Ferrum College. The College will value it based upon the average of the high and low stock price on the date of the transfer. The College will then provide you with acknowledgement and receipt and direct the money according to your wishes.

If you have any questions, please contact Ferrum College's Advancement Office at advancement@ferrum.edu or 540-365-4211.