



Illinois Wesleyan University
 1312 Park Street
 Bloomington, IL 61701-2900
 (309) 556-3861
 jfish2@iwu.edu
 iwugiftplanning.org

Getting + Giving

the most from your Stocks



Please complete this form, indicating the purpose of your gift. Completed forms may be sent to the Office of Advancement ATTN: Jordan Fish 1312 Park Street Bloomington, IL 61701, or emailed directly to jfish2@iwu.edu.

Name(s) : _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Stock Name: _____ Number of Shares: _____

Stock Ticker: _____ Delivering Broker: _____

Expected Date of Transfer: _____

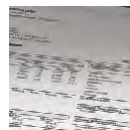
Designation: Unrestricted/ Operations

Restricted to _____

"I/We intend to give the above-referenced stock to Illinois Wesleyan University as a charitable contribution."

Donor Signature(s): _____

Please note: This notification form is not a receipt for your charitable donation.



Tax Smart



STOCKS



BONDS



FUNDS

Once the electronic transfer has been completed, we will determine the fair market value* of the securities being transferred and prepare the gift receipt.

**The value of a charitable gift of stock is determined by the average between the high and low stock price on the date of the gift. Mutual fund shares are valued using the closing price for the fund on the date of the gift. The date of the gift is the date the charitable organization receives the asset. Consult your broker for more information on the timing of the transfer.*

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

DELIVERY INSTRUCTIONS FOR AN ELECTRONIC TRANSFER

The Illinois Wesleyan University Account Executive at Wells Fargo Advisors is:

Mr. Marc Tucci
 Toll-free: 800/662-8575
 Direct Line: 309/662-8575
 Fax: 309/663-4340

Wells Fargo Advisors
 1705 Tullamore Suite B
 Bloomington, IL 61704

IWU DTC number: 0141
 IWU Account Number: 3983-4768
 IWU Tax ID: 37-0662594

Illinois Wesleyan University contact:
 Jordan Fish
 Director for Gift Planning
 Direct Line: 309/556-3861
 Email: jfish2@iwu.edu