

# Instructions for Gift of Securities to NC State University

Thank you for your interest in making a gift of securities to the Osher Lifelong Learning Institute (OLLI) at NC State University. Please share the information below with your broker to facilitate your gift. While all gifts benefit the work of NC State, the specific account to which you direct your giving may differ, depending on the areas of the university you choose to support.

A gift to OLLI should be directed to the NC State University Foundation, Inc., Korte/Kirsch Encore Endowment.

Completing and returning this form to Advancement Services will help to ensure that your contributions are properly directed. In addition, please have your broker contact Advancement Services when the transfer of securities is complete. If you hold securities in certificate form, or if you have other questions, please contact Advancement Services:

**Phone: 919-515-7827 • FAX: 919-513-2406 • Email: [stockgifts@ncsu.edu](mailto:stockgifts@ncsu.edu)**

Note to Executors: If you are transferring securities held by an estate, please contact the Office of Gift Planning (919-515-5106 / [giftplanning@ncsu.edu](mailto:giftplanning@ncsu.edu)) for instructions to ensure compliance with North Carolina law, as delivery instructions may differ.

Broker Information: Except as noted below, all securities should be delivered to:

**Charles Schwab & Co., Inc.**  
**1958 Summit Park Drive, Suite 200**  
**Orlando, FL 32810**

**DTC Number: 0164 Code 40**  
*(cleared through Charles Schwab & Co., Inc.)*

<b>If you would like to support:</b>	<b>Your gift should be made to:</b>	<b>Account number:</b>
Osher Lifelong Learning Institute	NC State University Foundation, Inc.	5789-0021

*For gifts to the Wolfpack Club, or other areas of the University, different stock instructions may be required.*

Delivering Brokerage Firm \_\_\_\_\_ Broker Name \_\_\_\_\_ Broker Telephone \_\_\_\_\_

Security Name \_\_\_\_\_ Security CUSIP/Ticker \_\_\_\_\_ Shares/Stocks \_\_\_\_\_ Par/Bonds \_\_\_\_\_

Donor Name \_\_\_\_\_ Donor Telephone \_\_\_\_\_

Donor Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

**NC State University Foundation, Inc., Korte/Kirsch Encore Endowment**  
Gift Designation at NC State University

Updated 2/15/2017