



Thank you for considering a gift of securities to Rosalind Franklin University of Medicine and Science. Gifts of securities can provide tax benefits while supporting the mission of the university.

To Make a Gift of Securities

It is important to contact Executive Director of Development George Rattin (george.rattin@rosalindfranklin.edu; tel: 847-578-8345) or email advancement@rosalindfranklin.edu so RFU can accurately identify your gift and determine if it is an unrestricted gift or if it has a designated purpose.

You will initiate any donation with your broker or financial adviser. When you contact RFU and your broker/financial officer, this is the information that helps complete the transaction:

☐ **Donor contact information**

- ☐ Name
- ☐ Address
- ☐ Phone Number
- ☐ Email

☐ **Security gift details**

- ☐ Name of security
- ☐ Ticker symbol
- ☐ Number of shares
- ☐ Approximate value of shares
- ☐ Broker name and firm

☐ **The date you intend to make the gift**

☐ **Designation of the gift, if known.**

Questions? Our gift officers listen and offer recommendations as appropriate.

To Transfer Securities Electronically:

To transfer securities electronically, please contact your broker to initiate the transfer. Please ensure your broker includes **your name and address on all transfers** to help us correctly value and direct your gift in a timely manner.

DTC Transfer Information:

BMO Harris Bank, N.A.

DTC #0992

Account Name: RFUMS CUSTODY – STOCK DONATIONS

F/C Account Number: 71-N344-01-6

Rosalind Franklin University of Medicine and Science EIN: 36-2181973

For assistance or questions about transferring certificates, mutual funds or securities, please contact:

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