

How to Make a Gift of Stock Through a Wire Transfer

Thank you for considering a gift of stock or shares of a mutual fund. A gift of stock is the easiest transaction. You simply request your broker to wire transfer shares to our account. If you decide to transfer stock it can be done electronically. You should tell your broker that our DTC number is #8862. Our account is with Merrill Lynch, Inc. You should specify that the transaction is for the **benefit of Syracuse (HSC) Medical Alumni Foundation** (our legal name). Our account number is 806-04024. In the case that you require this, our tax ID is 16-6038703. We are a 501(c)(3) corporation and your gift is tax deductible.

Once you have notified your broker to make the transaction, **please contact us at (315) 464-4362 to notify us that a stock transfer is in process and provide us with the name and number of shares.** This will ensure that the securities are properly processed to support the fund of your choice and credited to you. **Transferred stock does not come with any identifying information.**

Once we have received the stock in our account, we will give you the high, low and closing value of the stock on the day of transfer. Using this method, you pay no capital gains.

Instructions for wire transfer of stock:

Merrill Lynch/Bank of America, Inc.

DTC #8862

Account name: Syracuse Medical Alumni Foundation

ACCT# 806-04024

Tax ID# 16-6038703

Please indicate on the transaction:

For the Benefit of: Syracuse (HSC) Medical Alumni Foundation
Upstate Medical University
750 E. Adams St.
Setnor Academic Building, Suite #1510
Syracuse, NY 13210

If you or your broker has any questions, please call Paul Norcross, Executive Director at (315) 464-4362.

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