

Instructions for Gifting Stock to Earlham College

Stock Held in a Brokerage Account

1. Ask your broker to wire transfer your stock gift by DTC to the Earlham College account at Fidelity.
Fidelity in Indianapolis, IN: DTC #0226
Account Name: Earlham College
Account Number: Z49855685
2. Donor information is not included with the transfer, so please inform Melissa Tan (tanme@earlham.edu or 765-983-1634) of the name and number of shares you are transferring and how you would like the gift to be used.
3. We value your gift for our records at the average of the high and low on the day it is received into our account. An acknowledgement letter will be sent to you by mail, confirming receipt and designation of your gift.

Stock Certificates Held by You

Items you will need:

- Stock certificate – do not fill out the endorsement or assignment – leave stock certificate blank.
- Brief letter detailing the number of shares, name of company, and purpose of your gift.
- Irrevocable Stock or Bond Power – see next page for instructions
- Certificate Release Request – requires signature guarantee – see next page for instructions. Both forms are available in a fillable pdf format on our website at earlham.edu/stock-gift.

In separate envelopes, send:

1. Envelope one: Stock certificate and description letter
2. Envelope two: Irrevocable Stock Power form and Certificate Release Request form

Send these both by registered, first class mail to our office:

Earlham College
Attn: Melissa Tan
Institutional Advancement
Drawer 193
Earlham College
801 National Road West
Richmond, IN 47374

Instructions for completing Irrevocable Stock or Bond Power form :

The form includes the Fidelity logo and navigation buttons (Print, Reset, Save). It is divided into three main sections:

- 1. Registration:** A field for "Entity/Business/Trust Name" is highlighted with a blue arrow pointing to a callout box that says "Your name EXACTLY as it appears on the stock certificate".
- 2. Irrevocable Stock or Bond Power for Value Received:** A large "LEAVE BLANK" box is placed over the signature area, with a blue arrow pointing to it from a callout box that says "Sign".
- 3. Signatures:** Two signature lines are present. The first is highlighted with a blue arrow pointing to a callout box that says "Account Number: Z49855685". The second is highlighted with a blue arrow pointing to a callout box that says "Sign".

Instructions for completing Certificate Release Request:

The form includes navigation buttons (Print, Reset, Save As) and a title "Certificate Release Request". It contains the following sections:

- 1 CUSTOMER INFORMATION:** Fields for "Name of Fidelity account owner" (Earlham College), "Brokerage Account Number" (Z 4 9 - 8 5 5 6 8 5), and "Daytime Telephone Number" (765) 983 - 1468 are highlighted with blue arrows pointing to a callout box: "Fill in Earlham's account information".
- 2 AUTHORIZATION TO DEPOSIT:** Fields for "Quantity of Shares" and "Security Name" are highlighted with blue arrows pointing to a callout box: "Fill in with information from the stock certificate.".
- 3 SIGNATURE(S) OF NAMED CERTIFICATE HOLDERS:** Two signature lines are present, each with a blue 'X' mark. A blue arrow points from the first signature line to a callout box: "Signature with signature guarantee required.".
- 4 SIGNATURE GUARANTEE:** Two empty boxes for "SIGNATURE GUARANTEE (for Owner)" and "SIGNATURE GUARANTEE (for Joint Owner)" are shown at the bottom.