



Oregon State University
Foundation

4238 SW Research Way
Corvallis, Oregon 97333

541-737-4218
foregonstate.org

Securities Transfer Instructions

Thank you for your interest in transferring securities to the OSU Foundation. The following information is provided to assist in the electronic transfer of these securities. Please wire the gifted securities to:

Brokerage Firm: **Charles SCHWAB**
Phoenix Service Center
2423 E Lincoln Drive
Phoenix, AZ 85016
541-684-3042
888-403-9000

DTC Clearing #: 0164 Code 40

Account #: 6822-7808

FBO: Oregon State University Foundation

Tax ID Number: 93-6022772

Once the transfer is complete, we will sell the securities and provide you with an official tax receipt to include details of the securities transferred. **Please notify Kristi Tracy of the type of stock, number of shares, approximate transfer date and gift designation to better track the gift** (*see contact information listed below*). If you have any other questions regarding this transfer, you may contact one of the following individuals at the OSU Foundation:

- **Kristi Tracy** / Director, Investment Operations & Budget
- **Kevin Harvey** / Vice President & CFO

OSU Foundation - Main Line (Receptionist): 541-737-4218 or 800-354-7281

Kristi's Contact Information

Direct Line: 541-737-9583

Kristi.Tracy@osufoundation.org