

## Securities Transfer Instructions

Fairfield University encourages the electronic transfer of gifts of securities. To transfer securities electronically, please provide your broker or bank with detailed instructions concerning the transfer, including the name of the stock and the number of shares to be transferred from your account to the account of Fairfield University at the financial services company below.

**Merrill Lynch Wealth Management** (Formerly Banc of America Investment Services Inc.)  
**100 Jericho Quadrangle**  
**Suite 242**  
**Jericho, NY 11753**

**Contact Persons: Rod Jones at (516) 827-3206**  
**or Barbara Sheridan (516) 827-3216**

**DTC (Depository Trust Company) #5198**  
**Fairfield University Account #2Z7-02000**  
**Reference: Donor's Name**

In addition, please contact Kathleen Nash, [knash4@fairfield.edu](mailto:knash4@fairfield.edu) or (203) 254-4000 ext. 2397 to inform the University about the details of the transfer. Please provide the name of the stock, the number of shares, and the name of the brokerage or bank from which the transfer will be made. Please be specific about the purpose to which the gift will be directed.

**Please note:** Fairfield University's fiscal year runs from July 1 – June 30.

Updated October 2013