

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) # 8862
Fairfield University Account #2Z7-02000
Reference: Donor's Name

In addition, please contact Lisa Sabia, lsabia@fairfield.edu or (203) 254-4000 ext. 2765 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 November 2017