



## INSTRUCTIONS FOR TRANSFERRING GIFTS OF STOCKS AND BONDS TO THE UCLA FOUNDATION

PLEASE DELIVER BY DTC TO: Wells Fargo Advisors, LLC

For: The UCLA Foundation, Tax ID #95-2250801  
DTC #0141  
A/C #1998 4186

Financial Advisor: Michael Kramer (310) 443-2552

DONOR NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

NAME OF SECURITY: \_\_\_\_\_

NUMBER OF SHARES: \_\_\_\_\_

FUND NAME/PURPOSE: \_\_\_\_\_

UCLA CONTACT: \_\_\_\_\_

### IMPORTANT

Please notify AS Treasury at UCLA by e-mail [securities@support.ucla.edu](mailto:securities@support.ucla.edu) or by fax (310) 209-4264 prior to transferring securities as **donor information does NOT transmit through the DTC wiring system**. If you have any questions, please e-mail [securities@support.ucla.edu](mailto:securities@support.ucla.edu) or call AS Treasury at (310) 794-3333.

**Note:** For tax purposes, your gift will be valued on the average price (the mean between the highest and lowest selling prices) of the stock on the date of the gift. For accurate valuation purposes, sending broker may be advised to initiate securities transfer after market close, but before the close of their business day.



Revised 2017