University of Florida Foundation, Inc.
PO Box 14425, Gainesville, FL 32604-2425
EIN# 59-0974739 | 501(c)(3) tax exempt

Security Transfer Instructions Form

Process Overview

Once **initiated by the donor with their broker**, the process generally takes 2 to 3 days for the securities to transfer to Pershing, a clearing house and subsidiary of BNY Mellon, and then to the UF Foundation.

Donor/Broker Transfer → Clearing by BNY/Pershing → Received by UF Foundation → Liquidation

This process, as depicted above, will generate two values:

1. **Gift Value** – the value based on the average price between the highest and lowest price on the date received by the UF Foundation. The donor will receive a gift receipt with the gift value.
2. **Liquidation Value** – the sales proceeds from liquidating the securities.

Once the transfer is initiated with your broker, please provide a copy of this form via fax to 352-334-8053 or email to transfers@uff.ufl.edu. For questions, please contact Krystle Castillo at 352-392-2827 or transfers@uff.ufl.edu.

Transfer Information

DTC #: 0443 | Clearing House: Pershing, LLC | For Credit to Account #: N7M001277

Client Account Name: University of Florida Foundation, Inc. | Reference: Donor Name

Donor Information

If the donor cannot be identified, the UF Foundation will return the stock to the originating institution.

Donor Name	
Address	
City, State, Zip	
Purpose of Gift	
Broker Name/Phone	

Security Information

Stock or Mutual Fund Name	**Ticker**	**Shares/Units**