



**California State University, Long Beach  
University Relations and Development/CSULB 49er Foundation  
Gift of Securities Notification Form**

In order that we apply our donor's gift appropriately, donors should submit a completed Gift of Securities Notification Form to Mary Ann Messing in the CSULB 49er Foundation prior to initiating the transfer. This form will also authorize the donor's broker to initiate the gift to the CSULB 49er Foundation. Completed forms should be sent to via fax (562-985-7951) or email ([maryann.messing@csulb.edu](mailto:maryann.messing@csulb.edu)).

**NOTE: This form is not to be used for Charitable Gift Annuities. Contact the Office of Gift Planning at 5-5489 for CGA transfers.**

**DONOR INFORMATION**

<b>Donor Name(s):</b>	<b>Phone Number:</b>	<b>Date:</b>
<b>Address:</b>		

**BROKER INFORMATION**

<b>Broker Name:</b>	<b>Phone Number:</b>	<b>Date:</b>
<b>Firm:</b>		

**GIFT INFORMATION**

<b>Name of Stock:</b>	<b>Number of Shares:</b>
<b>Allocation:</b>	<b>CSULB Contact Person:</b>
<b>Purpose of Gift:</b>	

Deliver to:

Rocky Suarez  
Wells Fargo Advisors, LLC  
6700 E. Pacific Coast Highway, Suite 170  
Long Beach, CA 90803-4217

Phone: (562) 596-9919  
Fax: (562) 430-9295

Account Name: California State University Long Beach  
49er Foundation

DTC wire transfer number: 0141

Account # 48737204

**Authorization of Donor(s):**

_____	_____	_____
Print Name	Signature	Date
_____	_____	_____
Print Name	Signature	Date

**FOR FOUNDATION USE ONLY:**

Date Notification Form Received:	Date of Gift/Transfer:
Name of Stock:	Number of Shares:
Value Hi/Low:	Date Proceeds Received:
Account Name:	Account Number: