



**California State University, Long Beach
University Relations and Development/CSULB 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 Foundation prior to initiating the transfer. This form will also authorize the donor's broker to initiate the gift to the CSULB Foundation. Completed forms should be sent to via fax (562-985-7951) or email (mmessing@csulb.edu).

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

DONOR INFORMATION

| | | |
|-----------------------|----------------------|--------------|
| Donor Name(s): | Phone Number: | Date: |
| Address: | | |

BROKER INFORMATION

| | | |
|---------------------|----------------------|--------------|
| Broker Name: | Phone Number: | Date: |
| Firm: | | |

GIFT INFORMATION

| | |
|-------------------------|------------------------------|
| Name of Stock: | Number of Shares: |
| Allocation: | CSULB Contact Person: |
| Purpose of Gift: | |

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

Account Name: California State University Long Beach Foundation
DTC wire transfer number: 0141
Account # 17638286

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

Signature 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: |