BASIC INSTRUCTIONS FOR COMPLETING A GIFT OF STOCK TO XAVIER VIA ELECTRONIC TRANSFER

revised 10/2021

If your securities reside in a brokerage account, ask your broker to transfer the specified shares electronically. You will need to make this request in writing.

Include in your letter to your broker the following information:

1. Your name: _____
2. Address: _____
3. Xavier University DTC number: **0015**
4. Xavier University account number: **285-107521-302** (Our account is held at Morgan Stanley.)
5. Xavier University Federal EIN: **31-0537516**
6. Name of stock: _____
7. Number of shares: _____
8. Please specify the Xavier college, program, and/or fund to which you would like to direct your gift: _____

Send a copy of this form via mail to: Xavier University
Internal Operations, Attn: Gift Processing
3800 Victory Parkway
Cincinnati, OH 45207-5440
513 745-1005 or 513-745-2085

Or via email to **egiftprocessing@xavier.edu**

Or via fax to 513-745-2088

If your broker has questions about making an electronic gift of securities, please have your broker or financial institution contact our brokers,

Ms. Angela Geraci-Lawson, **angela.l.geracilawson@morganstanley.com**, 513-762-5291 or 800-543-2665, or
Michael Cure at Morgan Stanley, 7755 Montgomery Road, 2nd floor, Cincinnati, OH 45236.

You should not allow your broker to sell the securities and send Xavier a check. If the broker does this, the tax advantages of making a gift of appreciated stock may be eliminated.

GIVE ONLINE

xavier.edu/givetoday