

**UNIVERSITY OF MINNESOTA FOUNDATION
Stock Transfer Information**

When you initiate a transfer of stock, please use our Online Giving Tool or send a letter to the Foundation confirming the details of your gift.

Online Giving Tool

This new tool allows you to tell us when you have transferred stock or plan to transfer stock as well as information that we will need to prepare a receipt for your stock gift.

https://www.foundation.umn.edu/pls/dmsn/online_giving.frames_broker_securities

Securities held at brokerage firm (new instructions)

To transfer shares held with a brokerage firm, the following information should be provided to your broker:

Account Registration: University of Minnesota Foundation

RBC Wealth Management
Account #30875055
DTC #0235
Attention: Hal Tearse (952) 476-3729
601 Carlson Pkwy Ste 500
Minnetonka, MN 55305

Other Security Transfers

If you would like to transfer mutual funds, bonds, stock certificates or shares held with transfer agents, please contact accounting for the best method to initiate your transfer.

University of Minnesota Foundation
Accounting Services - Crystal Carlson
200 Oak Street SE, Ste 500
Minneapolis, MN 55455-2010
612-624-0213
800-775-2187