STOCK TRANSFER INSTRUCTIONS

- When you are ready to electronically transfer stock give your broker the following information about our preferred broker:

  National Financial Services
  DTC: 0226
  Further credit to account #: **NYK-004176**
  Account Name: **Dallas College Foundation – Gift Account**

  Dallas College Foundation's Tax ID: 23-7326612

- Please send an email notifying DCF of the stock transfer to Suzanne Bristol, SBristol@DallasCollege.edu. The email must contain the brokerage transferring the stock; the name of stock, i.e. Apple, Microsoft, Amazon and symbol; number of shares; and the gift designation at DCF.

- Before filling out paperwork for a mutual fund transfer, it is important to clarify if the mutual funds are held with a broker-dealer in a brokerage account or held directly with the mutual fund company. Some mutual funds are not accepted.

- If you have any questions regarding your stock gift transfer, please use the contact information below and we will happily assist you with any questions you may have.

National Financial Contacts

Brett Lane
Brett.Lane@cnb.com
212.207.6846 office
443.803.8828 cell

Nick Attard, CFA
Nicholas.Attard@cnb.com
917.322.0638 office
203.395.6035 cell

Dallas College Foundation Contacts

Suzanne Bristol, Sr. Director of Finance
SBristol@DallasCollege.edu
214.378.1547 office
214.566.6298 cell

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