

Supporting Susquehanna: *Stock and IRA gifts*

The following instructions clarify processes related to gifts of securities and IRA contributions. Please share them with your financial team to help facilitate your gift, and contact us with any questions.

Contributing securities to Susquehanna University via electronic transfer:

1) Your bank or broker may transfer stock to Susquehanna using the following:

Brokerage: Janney Montgomery Scott

Phone: (570) 286-6447

Account Number: 8061-4270

DTC#: 0374

Susquehanna University's EIN is 23-1353385

2) Your gift will be credited on the transfer date. In order to correctly identify, value and receipt your gift in a timely manner, you or your broker should advise our Office of Gift Planning with the following information:

- Donor's name
- Stock information (number of shares, stock name and symbol)
- Originating broker
- Designation of gift, if known

Contributing shares from a mutual fund:

- 1) Contact your fund manager to request their instructions and forms to transfer your shares into a Susquehanna University account.
- 2) Please notify the Office of Gift Planning of your pending transfer.

Contributing directly from your IRA or other electronic fund transfer:

Electronic distributions from IRA accounts or direct electronic account transfers must be made directly to Susquehanna University from the IRA administrator. Checks made payable to the donor and endorsed to SU will not be considered qualified.

For IRA funds that have been liquidated or electronic fund transfers:

Susquehanna University's account is at Fulton Bank
Account number: 009 232 2912 Routing number: 031 301 422
1255 North Susquehanna Trail, Hummels Wharf, PA 17831

Contributing an IRA Rollover Check:

Contact your IRA plan administrator to initiate a direct transfer from your IRA account to Susquehanna University, sent to the mailing address below. You may request that your name and address as the donor of record be shared in connection with the transfer.

Thank you for your support!

For additional information or assistance, please contact:
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514 University Avenue • Selinsgrove, PA • 17870