Gettysburg College
Gift Delivery Instructions for Charitable Remainder Trusts

Donors wishing to transfer cash, checks, or securities to charitable remainder trusts should contact their gift officer, e-mail plannedgiving@gettysburg.edu, or call Mickie Woodward in the planned giving office at 800-238-5528 or 717-337-6438.

The College will need to know the following information:

1. The name and CUSIP number of the issue
2. The exact number of shares being transferred
3. The firm from which the gift is being transferred.

Upon learning of the intended gift, the College will do the following:

1. Inform State Street Global Advisors, with whom the College works to administer its life income gift program, of the intended gift.
2. Inform the donor of the unique FFC account number and name to include with the transfer information.

Account Transfer Information

Gettysburg College’s Federal Tax ID Number is 23-1352641.

Cash

Checks by U.S. Postal Service or overnight delivery

State Street Bank and Trust Company
Charitable Asset Management
One Lincoln Street – 24th Floor
Boston, MA 02111-2900
For FFC account #: ____________________________
Account name: ________________________________

Wire transfers

State Street Bank and Trust Company, Boston, MA
ABA Routing #011-000-028
To account #5673-032-8 (Reconciliation Clearance)
For FFC account #: ____________________________
Account name: ________________________________
DTC-Eligible Securities

Electronic transfer via the Depository Trust Co. system

State Street Bank and Trust Company
One Lincoln Street
Boston, MA 02111-2900
DTC ID #0987
For FFC account #: ________________________
Account name: ____________________________

Physical Form Securities

By U.S. Postal Service or overnight delivery

State Street Bank and Trust Company
Charitable Asset Management
One Lincoln Street – 24th Floor
Boston, MA 02111-2900
For FFC account #: ________________________
Account name: ____________________________

(Stock/bond powers should be sent under separate cover)

Federal Reserve Securities

By Federal Reserve wire

STATE ST BOS/SPEC/BJ50
For FFC account #: ________________________
Account name: ____________________________
ABA Routing #011-000-028 (Free Delivery)

NOTE: Please be advised that for electronically transferred securities, the date of gift is determined at the day it enters one of the College’s brokerage accounts, which may or may not be the same day donors instruct their broker to make the transfer. As there are several steps involved, transfer times can vary from same day to up to 5 days, especially for mutual funds and during certain periods such as end of the calendar year. The value of the gift is generally determined as the average of the high and low prices on the date of the gift.