MAKING GIFTS OF SECURITIES/MUTUAL FUNDS
TO GETTYSBURG COLLEGE

Gettysburg College works closely with several preferred brokers to provide both the College and our donors with the highest level of service. These relationships enable us to record your gifts and put them to work as quickly as possible. These brokerage accounts and detailed instructions for making gifts of securities and mutual funds are provided below.

We want this process to be as smooth, convenient, and obstacle-free for you as possible. Please call the development office at 800-238-5528 if you have any questions. Thank you.

I. Accounts and Contacts for Electronic Transfer

Whenever possible, transfers should be made to one of the accounts listed below and to the attention of the contact person listed:

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**Morgan Stanley**
c/o Kirby Beshore ’74
4507 North Front Street, 2nd Floor
Harrisburg, PA 17110

717-255-6666
800-676-0673

**Account Number:** 410034801003  
**Deposit Trust Company:** #0015

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**Merrill Lynch**
c/o David Haight
14 Exchange Place
Jersey City, NJ 07302

201-946-4014
800-778-9935
Fax: 973-607-4647

**Account Number:** 82B02229  
**Deposit Trust Company:** #5198

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**Charles Schwab**
c/o Ryan Claar
22 A North 2nd Street
Harrisburg, PA 17101

717-257-3936
800-435-4000

**Account Number:** HG36421756  
**Deposit Trust Company:** #0164
II. Transfer Instructions

A. Electronic Transfers

If securities or mutual funds are held by your bank, broker or mutual fund company, and you are making the transfer electronically via the Depository Trust Co. (DTC) system:

1. Please contact one of the following individuals, or a member of the development office whom you know (1-800-238-5528) here at Gettysburg College to let them know you are making a transfer and which broker you are using.

<table>
<thead>
<tr>
<th>Linda Sponseller</th>
<th>Jim Orner</th>
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<tr>
<td>1-800-238-5528</td>
<td>1-717-337-6221</td>
</tr>
<tr>
<td>1-717-337-6811</td>
<td><a href="mailto:jorner@gettysburg.edu">jorner@gettysburg.edu</a></td>
</tr>
<tr>
<td><a href="mailto:lsponsel@gettysburg.edu">lsponsel@gettysburg.edu</a></td>
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Knowing in advance that you intend to transfer securities or mutual funds minimizes the risk of your gift being delayed because we are able to recognize you as the donor.

2. Contact your broker and instruct him/her to transfer your gift via DTC to one of our accounts listed above.

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

B. Certificates

1. By Mail
If you hold the securities in certificate form, you may mail the securities and stock powers (one for each stock certificate) in separate envelopes to:
Linda Sponseller
Gettysburg College Box 426
300 North Washington Street
Gettysburg, PA 17325

Please be certain to have your signature(s) on the stock powers guaranteed by a certified bank officer and complete the section indicating the name of the stock, the number of shares, and the certificate number(s).

The value is determined as the average of the high and low prices on the date of gift, which is the postmark for documents sent through the U.S. Postal Service, or the date that we receive the documents in all other cases. If the certificate and stock power are postmarked on different dates, the later date will be used.

Mutual funds do not have certificates and cannot be mailed to the College.

2. **Hand Delivery or Delivery by Other Couriers**

If the certificate is hand delivered to a member of the Development, Alumni, and Parent Relations staff or sent by a courier other than the U.S. Postal Service, the value is determined as the average of the high and low prices on the date of gift, which is the date the College takes physical possession of either the certificate or the stock power, whichever is later.