



## Gifts of Securities Information for Donors

The value of your gift depends upon the market price of the stock on the day USU receives the stock. USU policy 517.4.3 states that gifts of securities are sold as soon as practical. The actual amount that USU receives from the sale varies due to market fluctuation and fees. You should always contact your financial advisor for professional advice regarding charitable contributions of securities. If your gift needs to be a minimum amount (e.g., \$25,000 to establish an endowment) and the sale amount is less than the minimum, you may need to do one of the following:

- increase the quantity of shares
- make an additional gift to cover the difference

### Broker Account Information

#### Morgan Stanley Wealth Management

Acct Name: Utah State University

Acct. # 124-123296

DTC # 0015

Morgan Stanley Contact: Brian Parcell

801-578-8015 (Brian direct)

800-733-9036

60 East South Temple, Suite 2000

Salt Lake City, UT 84111

Additional Morgan Stanley Contact:

Rattana Phommalay

Direct: 801-578-8048 Fax: 435-245-1436

E-mail: [rattana.phommalay@ms.com](mailto:rattana.phommalay@ms.com)

USU Contact:

Colleen Hobson

Direct: 435-797-1285 Fax: 435-797-1364

Email: [colleen.hobson@usu.edu](mailto:colleen.hobson@usu.edu)

### Donor Instructions

1. Contact your advisor and use the above information to make the gift. Donor information should be added to the note field in the transfer instructions.

2. Contact your development officer or Colleen Hobson at [colleen.hobson@usu.edu](mailto:colleen.hobson@usu.edu) or 435-797-1285 and notify them with donor name, type of stock being transferred, number of shares and designation of the gift.