

University of Pittsburgh – Securities Gift Processing Delivery Instructions

Transferring securities electronically via Depository Trust Company (DTC) into the University's gift account at BNY Mellon. Please instruct your broker/agent to transfer securities to:

BNY Mellon

DTC# 0443 Pershing, LLC
Further Credit account #N7M001699
FBO University of Pittsburgh
ATTN: Jorja Watts
Phone: 412-234-0439
Email: jorja.watts@bnymellon.com

Contact BNY Mellon at least 24 hours prior to delivery and instruct your broker/agent to contact the University of Pittsburgh, Office of Finance, at least 24 hours prior to delivery.

Office of Finance

Julie Manko
Phone: 412-624-1799
Email: jmanko@cfo.pitt.edu

Mutual Funds and Foreign Security Gifts

Please contact Jorja Watts at BNY Mellon Capital Markets to check on the ability to accept the mutual fund and coordinate delivery. Phone 412-234-0439 or email jorja.watts@bnymellon.com.

Physical Securities

ALTERNATIVE: IF YOU ARE CURRENTLY IN POSSESSION OF PHYSICAL SECURITIES SUCH SECURITIES MAY BE DELIVERED TO THE UNIVERSITY AS SET FORTH BELOW.

- a. The physical securities along with a transmittal letter identifying the enclosed securities (name, class, number of shares, quantity, and certificate numbers) and the purpose for the transfer (gift, charitable gift annuity, trust, etc...) may be sent to the University as indicated below:

Mail via **Registered Mail** to:
University of Pittsburgh
Office of Finance
Attn: Julie Manko
2409 Cathedral of Learning
Pittsburgh, PA 15260

NOTE: Security certificate should not be executed.

- b. In addition, the stock/bond power should be completed **and mailed under separate cover** to the above address. The power must be executed (signed) identically to the registered security. Fill in "University of Pittsburgh" in the "sell/assign/transfer" section. **Please do not fill in the "attorney to transfer" section.**

**IRREVOCABLE STOCK POWER
(FOR TRUST AGREEMENTS)**

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto University of Pittsburgh, as Trustee, for the benefit of _____ Trust (_____), shares of _____ stock of _____, represented by Certificate No(s). _____, standing in name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint _____ attorney to transfer the said shares of stock on the books of said Company, with full power of substitution in the premises.

IMPORTANT: The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration.

Dated _____

(Owner Signature)

Dated _____

(Owner Signature)

SIGNATURE(S) MUST BE MEDALLION GUARANTEED

**IRREVOCABLE STOCK POWER
(FOR CHARITABLE GIFT ANNUITY AGREEMENTS)**

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto University of Pittsburgh (_____) shares of _____ stock of _____, represented by Certificate No(s). _____, standing in name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint _____ attorney to transfer the said shares of stock on the books of said Company, with full power of substitution in the premises.

IMPORTANT: The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration.

Dated _____

(Signature)

Dated _____

(Signature)

SIGNATURE(S) MUST BE MEDALLION GUARANTEED

**IRREVOCABLE BOND POWER
(FOR TRUST AGREEMENTS)**

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto University of Pittsburgh, as Trustee, for the benefit of _____
_____ Trust, (_____) bonds of _____
_____ in the principal amount of \$_____, represented by No.(s) _____, standing in name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint _____ attorney to transfer the said bond(s) on the books of said Company, with full power of substitution in the premises.

IMPORTANT: The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration.

Dated _____

(Bondholder Signature)

Dated _____

(Bondholder Signature)

SIGNATURE(S) MUST BE MEDALLION GUARANTEED

**IRREVOCABLE BOND POWER
(FOR CHARITABLE GIFT ANNUITY AGREEMENTS)**

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto the University of Pittsburgh (_____) bonds of _____ in the principal amount of \$_____, represented by No.(s) _____, standing in name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint _____ attorney to transfer the said bond(s) on the books of said Company, with full power of substitution in the premises.

IMPORTANT: The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration.

Dated _____

(Bondholder Signature)

Dated _____

(Bondholder Signature)

SIGNATURE(S) MUST BE MEDALLION GUARANTEED

IRREVOCABLE STOCK POWER

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto
UNIVERSITY OF PITTSBURGH (_____) shares of the _____

_____ **Stock of** _____

represented by Certificate No. _____ inclusive, standing in name of the
undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint _____
_____ attorney to transfer the said stock(s) on the books of said Company,
with full power of substitution in the premises.

must

IMPORTANT: The signature(s) to this power

correspond with the name(s) as written upon the
face of the certificate(s) in every particular without
alteration.

Dated _____