

**Gifts of Appreciated Stock**

**(REVISED)**

**Why:**

Many Marian University alumni and friends often take advantage of the various benefits of making gifts through appreciated stock: one being the personal satisfaction of assisting Marian University and its worthy students to advance the scope and quality of Franciscan Catholic collegiate education.

**How:**

You may transfer stock electronically to Marian University from your financial institution.

1. To initiate the stock transfer, provide your broker with the following Marian University instructions:
  - a. LPL Financial DTC Participant # 0075
  - b. For Further Credit to LPL Account Number: 5263-9901
  - c. For Further Credit to Marian University
  
2. Please contact the Investment Strategies Team with Old National Investments at 877-332-4700, Option 4, or email them at [ist@oninvestments.com](mailto:ist@oninvestments.com) with the following information:
  - a. Name of donor
  - b. Name of stock
  - c. Number of shares
  - d. Date of transfer
  - e. Contact person from your financial institution for follow up
  - f. CUSIP number, if available
  
3. Marian University will provide a gift receipt letter upon verification from the Investment Strategies Team of the transfer of the gift. The value is determined by the number of shares donated times the weighted average price (of trades) on day the stock was received.

*Revised 4/11/2024*