



Instructions for Making a Gift via Stock Transfer

The following instructions are for the electronic (DTC) transfer of stock only. If you have a paper stock certificate you wish to gift, please contact the Phi Delta Theta Foundation directly at (513) 523-6966 for specific instructions.

Step 1. Contact your broker and provide the following information:

Corporate Name:	Phi Delta Theta Foundation
Federal ID Number:	34-6539803
DTC#:	0164
Schwab Institutional Code:	40
For Credit to:	Phi Delta Theta Foundation
Account	8777-6855

Step 2. Call or email Thomas Shumate at the Phi Delta Theta Foundation with the following information:

Name and address of donor
Date of the stock transfer
Name of stock and number of shares transferred
Mean value per share on the date of transfer
Contact Information:

Thomas Shumate, Senior VP of Finance
Phi Delta Theta Foundation
2 South Campus Avenue
Oxford, OH 45056
(513) 523-6966
tshumate@phideltatheta.org