



Gift Transfer Instructions

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 513.280.6707 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 Donation A/C #6620-2117

Step 2: Call or email Tom 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.

Making a Gift via Wire Transfer

The following information is for the wire transfer of general gifts to the Phi Delta Theta Foundation.

Beneficiary/Account Holder Information:

Account Name: Phi Delta Theta Foundation
 Account Number: 1283847
 Address: 2 South Campus Avenue, Oxford, Ohio 45056
 Phone: 513.280.6707

Beneficiary Bank:

Bank Name: First Financial Bank NA
 Routing Number: 042200910
 Address: 300 High Street, Hamilton, Ohio 45011
 Phone: 877.322.9530

Questions? Contact:

Tom Shumate
 Senior Vice President of Finance
 Phi Delta Theta

Phone: 513.523.6345, Ext. 221
 Email: tshumate@phideltatheta.org

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