



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
National Financial Services LLC For Account Number:	676-360184
For Account of:	Phi Delta Theta Foundation
DTC#:	0226

Step 2: Call, fax 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, Controller
 - Phi Delta Theta Foundation
 - 2 South Campus Avenue
 - Oxford, OH 45056
 - (513) 523-6966
 - (513) 523-9200 (Fax)
 - tshumate@phideltatheta.org