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

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