Gifts of Publicly-traded Securities
NCSSM Foundation Office

Thank you for your interest in making a gift of securities to the North Carolina School of Science and Mathematics Foundation. Please share these instructions with your broker to help facilitate your gift and contact the NCSSM Foundation Office with any questions you may have.

If the securities are held electronically:
Your bank or broker may transfer stock to NCSSM Foundation’s brokerage account with the information below.

Brokerage Firm: Wells Fargo Advisors (Wells Fargo Clearing Services, LLC, Member SIPC)
Account Number: 5922-6350
DTC Number: 0141
Contact: Paul Terrey, Financial Advisor, paul.terrey@wellsfargoadvisors.com, 919-969-4837
Toll Free: (800) 334-1637

It is important that the bank or broker contact the Foundation Office in order for us to identify the transfer in a timely and accurate manner.

What information is helpful? To help us correctly identify, value and receipt your gift in a timely manner, the following information from you or your broker is important.
- Donor’s name
- Stock information (number of shares, name of stock and symbol)
- Originating broker
- Gift Designation

If you hold the securities in certificate form:
Please send by first-class mail or hand deliver the unendorsed certificate(s) along with a letter of transmittal which includes your name, address and where you want the gift designated.

In a separate envelope, mail to the same address a copy of the transmittal letter along with a stock power executed in blank for each stock certificate you are donating. You should sign one stock power for each stock certificate and have your signature guaranteed by a bank officer. The bank officer should not date the signature guarantee.

If you prefer to have your certificate re-registered:
The shares that you wish to donate to NCSSM should be registered to “North Carolina School of Science and Mathematics Foundation” The tax identification number is 56-1250756.

For assistance with a transfer or for more information, please contact:

Katie T. Wagstaff
President, NCSSM Foundation

office: 919-416-2866
email: wagstaff@ncssm.edu