



TEXAS A&M UNIVERSITY-KINGSVILLE FOUNDATION INSTRUCTIONS FOR GIFTS OF APPRECIATED STOCK

1. Texas A&M University-Kingsville Foundation, Inc. is an independent, nonprofit, 501(c)(3) corporation that has been designated by Texas A&M University-Kingsville, to receive, manage and administer major gifts on behalf of the university and its agencies [which includes Caesar Kleberg Wildlife Research Institute (CKWRI)].
2. Gifts of physical stock certificates to the Texas A&M University-Kingsville Foundation, Inc. must be accompanied by a cover letter describing the donor's intent for the proceeds of the sale of the stock. To donate physical stock certificate(s), you can sign a stock power and give that – along with your stock certificate(s) – to the Foundation. You can hand deliver these documents or send by mail. If you mail them, send the stock power and certificate(s) in separate letters for security purposes. Stock certificates received as gifts will be sold immediately upon receipt at the Foundation brokerage.
3. Donors may also arrange to contribute stock by having their broker contact the Foundation broker to arrange for the gift transfer.

The following information pertains to gifts of stock that are arranged between the donors' broker and the Foundation brokerage.

- a. Broker: Charles Schwab & Co., Inc.
- b. Telephone: 210-824-8916 Contact: Christina Lecholop or LeeAnn Iacona [South Texas Money Management]
- c. DTC: 0164
- d. Fund: Texas A&M-Kingsville Foundation Holding Account, 7665-5689

The donor or his/her broker should call the Foundation [361-593-2678] and provide the following information prior to making the gift transfer.

- e. Type of stock (e.g. common, preferred),
- f. The Company whose stock is being donated,
- g. Number of shares and
- h. Approximate date of the transfer.

After the Foundation has been notified that the stock transfer has been completed and the stock has been sold, the Foundation will make arrangements to transfer the funds to the designated account(s).