

# ***ALFRED UNIVERSITY***

## ***STOCK TRANSACTION***

### ***PROCEDURES***

*For additional information or assistance, please call:  
Jason Amore, Vice President for University Relations (607) 871-2144*

#### ***TO TRANSFER STOCK BY MAIL:***

*To gift stock by mail, send the stock certificate (unsigned) and a signed stock power in separate envelopes to:*

*Jason Amore  
Vice President for University Relations  
Alfred University  
Saxon Drive  
Alfred, NY 14802  
(607) 871-2144*

#### ***TO TRANSFER STOCK ELECTRONICALLY:***

- *Confirm with our account representative at Massey Quick Simon, Anders Velischek, your intentions to gift stock. Phone: (973) 525-1000 or email to [Anders.Velischek@mqsadvisors.com](mailto:Anders.Velischek@mqsadvisors.com)*
- *Massey Quick Simon is Alfred University's new investment custodian who is assisting us in managing our investment accounts at JP Morgan Chase.*
- *Your broker should transfer the stock to:*

***Alfred University Gift Account  
JP Morgan Chase  
DTC # 0226  
Account Number 647-663484  
Reference: Alfred University***

- *Absent instructions to the contrary, the stock will be sold upon receipt and the proceeds transferred to Alfred University, unless a pooled income fund gift is being created.*

*updated 3/29/17 mkd*

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