



Birmingham-Southern College

### **Guidelines for Publicly Traded Securities**

Birmingham-Southern College and the Birmingham-Southern College Foundation accept gifts of publicly traded securities, including stocks, bonds and mutual funds. This type of gift may be transferred electronically or delivered in certificate form. It is both the College's and the Foundation's general policy for all publicly traded securities to be sold upon receipt.

#### **Electronic Transfer**

BSC has established brokerage accounts at a number of local and national firms; however, our main account resides at Fidelity and all gifts of securities should be directed there if possible. The BSC Foundation has authorized the College to accept gifts on its behalf through these accounts.

#### **Step One: Transfer securities to Fidelity:**

Account Name: Birmingham-Southern College

DTC:#0226

Account Number: Z44-101877

Attention: FEG Investment Advisors

cis@feg.com or 513-977-4400

---

**Step Two: Please give receiving firm "information permission."**

**Step Three: Please ensure that your broker sends the Securities Transfer Notification Form (see reverse page) to [advancement@bsc.edu](mailto:advancement@bsc.edu)**

**Questions: 205-226-4909; advancement@bsc.edu**

## BSC Securities Transfer Notification Form

To be completed by broker or donor and emailed to [advancement@bsc.edu](mailto:advancement@bsc.edu)

Name of donor \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Date of transfer to BSC \_\_\_\_\_

Initiating Broker \_\_\_\_\_

Broker Contact Name \_\_\_\_\_ Broker Email \_\_\_\_\_

Broker Phone \_\_\_\_\_

Securities (and ticker symbols) and number of shares transferred:

\_\_\_\_\_

Purpose of donation (fund name if known)

\_\_\_\_\_

**Questions: 205-226-4909**

**advancement@bsc.edu**