



AUGUSTA UNIVERSITY FOUNDATION

Thank you for your interest in making a gift of assets to Augusta University through the Augusta University Foundation. Your support of the outstanding work by our students, faculty and healthcare professionals helps us lead the way in our community, state and nation in many avenues of teaching, research and care. We are sincerely grateful.

In order to ensure timely receipt and to direct your gift to support a specific fund, please provide:

Donor Name

Stock (symbol) / Number of Shares / Date Transfer requested

Fund Name gift is designated to support

This information may be shared with your philanthropy officer or you may contact Mary McCormack, AVP Philanthropy & Alumni Engagement for Gift & Estate Planning, 706-721-5027 or mmccormack1@augusta.edu to provide this information or to seek any assistance that you may need to transfer assets.

DONATION PROCEDURES

Book Entry: Securities that are held in book entry can be electronically delivered to Augusta University Foundation using the following Depository Trust Company (DTC) delivery instructions:

Truist Bank (formerly SunTrust Bank)
Mail Code GA-ATL-0221
303 Peachtree Street, Suite 1500
Atlanta, GA 30308
Contact Name: James Bernal
Contact number: 404-724-3644

DTC Participant #: 2039
FFC Truist Bank
Account #1121118 – BOR Temporary Clearing Account
Donor Name:
For Further Credit: Augusta University Foundation

Federal identification (EIN) is: 58-6038134.

If your broker has questions when delivering securities via DTC, please instruct them to contact our custodian, Truist Bank, at 404.724.3644.

Mutual Funds: When directing your broker to transfer mutual fund shares, please instruct them to contact our custodian, Truist Bank, at 404.724.3644. Please be sure your broker confirms the BIN number for mutual fund transfers with Truist Bank prior to delivery. All deliveries must reference the Augusta University Foundation and the BIN provided by Truist Bank.

Physical Stock and Bond Certificates: For physical stock certificate donations, please contact Associate Vice President, Philanthropy & Alumni Engagement for Gift & Estate Planning, Mary McCormack at 706-721-5027.

Valuation of Gift: Book entry donations are valued on the date of receipt in our account and are based on the HI and LO average for that day. If the stock is physical and the stock is re-registered in the name of Augusta University Foundation, the date on the certificate is used. If the stock is signed over to Augusta University Foundation and mailed, the postmark date is used. Mutual fund shares will be valued at the net asset value on the day of transfer.