

# The Ohio University Foundation



## STOCK TRANSFER INSTRUCTIONS

The Ohio University Foundation works with BNY Mellon Capital Markets LLC to receive gifts of marketable securities. Pershing LLC is the clearing broker for BNY Mellon Capital Markets LLC.

### Delivery Instructions for Electronic Transfers:

Pershing LLC  
One Pershing Plaza  
Jersey City, NJ 07399  
DTC #0443  
For Further Credit Account Number: N7M001012  
For Further Credit Account Name: The Ohio University Foundation

### Delivery Instructions for Physical Securities:

Available upon request. Please contact Candice Casto at 740-593-1901 or [castoc@ohio.edu](mailto:castoc@ohio.edu).

### BNY Mellon Contacts:

Group email – [bnymcmgiftprocessing@bnymellon.com](mailto:bnymcmgiftprocessing@bnymellon.com)  
Primary contact – Jason Rakip – 412-234-8342; [jason.rakip@bnymellon.com](mailto:jason.rakip@bnymellon.com)

### Tax identification number:

The Ohio University Foundation's EIN is 31-6402269.

### Important Tip:

Please send notification of the stock gift by one of the following methods. This will help us to identify your gift and acknowledge it promptly. Please include donor name, number of shares, stock/company name, and estimated transfer date in your notification. If the use of the gift is restricted, please include any donor designation or purpose restriction.

By mail            The Ohio University Foundation  
                         P.O. Box 869  
                         Athens, OH 45701

By email           [treasury@ohio.edu](mailto:treasury@ohio.edu)

By fax              740-593-1883

Questions may be directed to Candice Casto, Treasurer & CFO, The Ohio University Foundation, at 740-593-1901 or [castoc@ohio.edu](mailto:castoc@ohio.edu).

**THANK YOU for supporting Ohio University!**