



MAKING A GIFT OF STOCK TO THE PI KAPPA PHI FOUNDATION (UPDATED AUGUST 2015)

The following steps should be used when making a gift of stock to the Pi Kappa Phi Foundation:

1. Inform your broker that you wish to make a gift of stock to the Pi Kappa Phi Foundation through our broker, Wells Fargo Advisors.

Your broker will need the following information:

- The Pi Kappa Phi Foundation's brokerage account number is **#7356-9815**.
 - The Wells Fargo Advisors DTC (routing) number is **#0141**.
2. When requesting this transfer from your broker, please state that you wish to include the comment "*this is a gift of stock from [your name]*". This will help our accounting with your gift once Wells Fargo receives it.
 3. Your stock gift will be valued by the average price of the stock on the day that it is received in our brokerage account. All stocks will be sold immediately upon receipt.
 4. If you are holding an actual certificate of stock, simply transfer the certificate to the Foundation and mail it to:

Pi Kappa Phi Foundation
Attn: Marvin S. Hackney, CFO
PO Box 240526
Charlotte, NC 28224

If you have any additional questions about making a gift of stock, please call Marvin Hackney (Pi Kappa Phi Foundation's CFO) at (980) 318-5303.