



Stock, Mutual Funds and Incoming Electronic Funds Transfer Instructions for Donors

As of Aug 2024

As account information may change over time, please contact UD prior to initiating a transfer to ensure that you have the most current instructions.

University of Delaware EIN (Employer Identification Number) – 51-6000297

The valuation of gifts of securities is derived from averaging the highest and lowest selling price for the security on the date of receipt into a UD brokerage account. This methodology is in accordance with [IRS regulations](#).

Stock Transfers

The University of Delaware holds accounts with the two below brokerage firms. If you have an account with one of these firms, please instruct your broker to use this account. Otherwise, please use the Wilmington Advisors @ M&T account (LPL Financial). **Please instruct your advisor to provide your name along with the transfer.**

It is also important that you or your broker contact and disclose to the University the following:

- Donor name
- Name/ticker of stock
- Number of shares
- How you would like the gift proceeds to be allocated
- Time frame expected
- Name of brokerage account

Prior to the transfer of any gift, the above information should be submitted either to the development gift officer with whom you are currently communicating or the following University of Delaware Treasury Services contact(s):

Kristen Garcia

Sr. Manager, Treasury Services
(302) 831-3675
krisaber@udel.edu

Theresa Staso

Sr. Accountant
(302) 831-2108
tstaso@udel.edu

Beth Fetcho

Director, Treasury Operations
bfetcho@udel.edu



All accounts are in the name “University of Delaware”

Broker	Contact Information	Account Number
LPL Financial (Wilmington Advisors @ M&T)	285 Delaware Ave. Ste. 100 Buffalo, NY 14202 Steven Smith Assistant Vice President, ISG/ Municipal Capital Markets (410) 318-6841 sc.smith@mandtfinancialservices.com	4900-3713 DTC 0075

Broker	Contact Information	Account Number
Janney Montgomery Scott	Anthony A. Snaith (610) 254-1101 asnaith@janney.com Patricia Ranalli (610) 254-1136 pranalli@janney.com Toll Free: (800) 866-7608	836-46606 DTC 0374

Mutual Funds

If you wish to transfer mutual funds that are held directly with the fund company / issuer, you or your broker should contact Steven Smith with Wilmington Advisors @ M&T: sc.smith@mandtfinancialservices.com or (410) 318-6841.

If the mutual fund(s) are held with a brokerage firm, please have your broker transfer the mutual fund(s) via the same process as if it were a stock.

Incoming Electronic Transfers (ACH or Wire)

If you wish to transfer funds directly to the University via ACH or Wire, **please refer to the contact information below to obtain banking instructions:**

Meg Tallman
Sr. Director, Gift Admin & Data Mgmt
(302) 831-2308
mtallman@udel.edu

Gift Administration Team
Development & Alumni Relations
(302) 831-4333
gift-updates@udel.edu