



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

*As of June 2026*

**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](mailto:krisaber@udel.edu)

**Theresa Staso**  
Sr. Accountant  
(302) 831-2108  
[tstaso@udel.edu](mailto:tstaso@udel.edu)

**Beth Fetcho**  
Director, Treasury Operations  
[bfetcho@udel.edu](mailto: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 <b>Rob Budde, CFP</b> Institutional/Commercial Investment Consultant Office: (410) 244-4670 Mobile: (443) 401-4999 <a href="mailto:r.budde@mandtfinancialservices.com">r.budde@mandtfinancialservices.com</a>	4900-3713 DTC 0075

Broker	Contact Information	Account Number
Janney Montgomery Scott	<b>Anthony A. Snaith</b> Vice President (610) 254-1101 <a href="mailto:asnaith@janney.com">asnaith@janney.com</a>  <b>Patricia Ranalli</b> Senior Registered Private Client Associate (610) 254-1136 <a href="mailto:pranalli@janney.com">pranalli@janney.com</a>  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 Rob Budde with Wilmington Advisors @ M&T: [r.budde@mandtfinancialservices.com](mailto:r.budde@mandtfinancialservices.com) or (410) 244-4670.

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](mailto:mtallman@udel.edu)

**Gift Administration Team**  
Development & Alumni Relations  
(302) 831-4333  
[gift-updates@udel.edu](mailto:gift-updates@udel.edu)