

## **GIFTING SECURITIES TO CONCORDIA COLLEGE**

### **Securities/stock through electronic transfer:**

Inform your broker that you would like to have the securities sent to Concordia College, Moorhead, Minnesota via DTC transfer.

Concordia College works with Merrill Lynch and if you choose this option, please give your securities broker the following information:

Company: Merrill Lynch  
Broker is: Ron Nomeland or Tom Heilman  
Address: 51A Broadway N, FL 1  
Fargo, ND 58102  
Account Number: 439-96130  
DTC Number: 8862  
Phone Number: (701-241-1234)

This process is supported by Emily Gess, Accountant in the Concordia Treasurer's Office. Please send an email or letter to Emily Gess specifying (1) the type of securities, (2) stock symbol (if known), (3) number of shares or approximate value, and (4) the charitable purpose of the gift (e.g. the name of the department, scholarship, program, gift annuity or trust vehicle you are wishing to fund).

Send this letter to:

[egess@cord.edu](mailto:egess@cord.edu) or Concordia College  
Attn: Emily Gess  
901 South 8th Street  
Moorhead, MN 56562

### **If you possess the actual stock certificate:**

Please send the certificate and a stock power (in separate envelopes for your protection) to Emily Gess at the above address.

Please send a letter of gift designation to Emily Gess specifying (1) the stock that is being given, (2) stock symbol (if known), (3) the number of shares represented on the certificate, and (4) the charitable purpose of the gift (e.g. the name of the department, scholarship, program, gift annuity or trust vehicle you are wishing to fund).

### **Questions?**

Please call the Concordia College Office of Advancement at (218) 299-3733 or Emily Gess at (218) 299-4789. Toll free (800) 699-9896.

Thank you!