

## University of Pittsburgh – Securities Gift Processing Delivery Instructions

Transferring securities electronically via Depository Trust Company (DTC) into the University's gift account at BNY Mellon. Please instruct your broker/agent to transfer securities to:

### BNY Mellon

DTC# 0443 Pershing, LLC  
Further Credit account #N7M001699  
FBO University of Pittsburgh  
ATTN: Jorja Watts  
Phone: 412-234-0439  
Email: [jorja.watts@bnymellon.com](mailto:jorja.watts@bnymellon.com)

**Contact BNY Mellon at least 24 hours prior to delivery and instruct your broker/agent to contact the University of Pittsburgh, Office of Finance, at least 24 hours prior to delivery.**

### Office of Finance

Julie Manko  
Phone: 412-624-1799  
Email: [jmanko@cfo.pitt.edu](mailto:jmanko@cfo.pitt.edu)

### Mutual Funds and Foreign Security Gifts

Please contact Jorja Watts at BNY Mellon Capital Markets to check on the ability to accept the mutual fund and coordinate delivery. Phone 412-234-0439 or email [jorja.watts@bnymellon.com](mailto:jorja.watts@bnymellon.com).

### Physical Securities

**ALTERNATIVE: IF YOU ARE CURRENTLY IN POSSESSION OF PHYSICAL SECURITIES SUCH SECURITIES MAY BE DELIVERED TO THE UNIVERSITY AS SET FORTH BELOW.**

- a. The physical securities along with a transmittal letter identifying the enclosed securities (name, class, number of shares, quantity, and certificate numbers) and the purpose for the transfer (gift, charitable gift annuity, trust, etc...) may be sent to the University as indicated below:

Mail via **Registered Mail** to:  
University of Pittsburgh  
Office of Finance  
Attn: Julie Manko  
2409 Cathedral of Learning  
Pittsburgh, PA 15260

**NOTE: Security certificate should not be executed.**

- b. In addition, the stock/bond power should be completed **and mailed under separate cover** to the above address. The power must be executed (signed) identically to the registered security. Fill in "University of Pittsburgh" in the "sell/assign/transfer" section. **Please do not fill in the "attorney to transfer" section.**

**IRREVOCABLE STOCK POWER  
(FOR TRUST AGREEMENTS)**

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto University of Pittsburgh, as Trustee, for the benefit of \_\_\_\_\_ Trust (\_\_\_\_\_), shares of \_\_\_\_\_ stock of \_\_\_\_\_, represented by Certificate No(s). \_\_\_\_\_, standing in name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint \_\_\_\_\_ attorney to transfer the said shares of stock on the books of said Company, with full power of substitution in the premises.

**IMPORTANT:** The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration.

Dated \_\_\_\_\_

\_\_\_\_\_  
(Owner Signature)

Dated \_\_\_\_\_

\_\_\_\_\_  
(Owner Signature)

**SIGNATURE(S) MUST BE MEDALLION GUARANTEED**

**IRREVOCABLE STOCK POWER  
(FOR CHARITABLE GIFT ANNUITY AGREEMENTS)**

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto University of Pittsburgh (\_\_\_\_\_) shares of \_\_\_\_\_ stock of \_\_\_\_\_, represented by Certificate No(s). \_\_\_\_\_, standing in name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint \_\_\_\_\_ attorney to transfer the said shares of stock on the books of said Company, with full power of substitution in the premises.

**IMPORTANT:** The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration.

Dated \_\_\_\_\_

\_\_\_\_\_

(Signature)

Dated \_\_\_\_\_

\_\_\_\_\_

(Signature)

**SIGNATURE(S) MUST BE MEDALLION GUARANTEED**

**IRREVOCABLE BOND POWER  
(FOR TRUST AGREEMENTS)**

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto University of Pittsburgh, as Trustee, for the benefit of \_\_\_\_\_  
\_\_\_\_\_ Trust, (\_\_\_\_\_) bonds of \_\_\_\_\_  
\_\_\_\_\_ in the principal amount of \$\_\_\_\_\_, represented by No.(s) \_\_\_\_\_, standing in name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint \_\_\_\_\_ attorney to transfer the said bond(s) on the books of said Company, with full power of substitution in the premises.

**IMPORTANT:** The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration.

Dated \_\_\_\_\_

\_\_\_\_\_

(Bondholder Signature)

Dated \_\_\_\_\_

\_\_\_\_\_

(Bondholder Signature)

**SIGNATURE(S) MUST BE MEDALLION GUARANTEED**

**IRREVOCABLE BOND POWER  
(FOR CHARITABLE GIFT ANNUITY AGREEMENTS)**

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto the University of Pittsburgh (\_\_\_\_\_) bonds of \_\_\_\_\_ in the principal amount of \$\_\_\_\_\_, represented by No.(s) \_\_\_\_\_, standing in name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint \_\_\_\_\_ attorney to transfer the said bond(s) on the books of said Company, with full power of substitution in the premises.

**IMPORTANT:** The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration.

Dated \_\_\_\_\_

\_\_\_\_\_  
(Bondholder Signature)

Dated \_\_\_\_\_

\_\_\_\_\_  
(Bondholder Signature)

**SIGNATURE(S) MUST BE MEDALLION GUARANTEED**

**IRREVOCABLE STOCK POWER**

For Value Received, the undersigned does (do) hereby sell, assign and transfer unto  
UNIVERSITY OF PITTSBURGH ( \_\_\_\_\_ ) shares of the \_\_\_\_\_

\_\_\_\_\_ **Stock of** \_\_\_\_\_

represented by Certificate No. \_\_\_\_\_ inclusive, standing in name of the  
undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint \_\_\_\_\_  
\_\_\_\_\_ attorney to transfer the said stock(s) on the books of said Company,  
with full power of substitution in the premises.

**must**

**IMPORTANT: The signature(s) to this power**

correspond with the name(s) as written upon the  
face of the certificate(s) in every particular without  
alteration.

Dated \_\_\_\_\_