

The Foundation of the State University of New York at Binghamton, Inc.  
(DBA Binghamton University Foundation)

**LETTER OF INTENT TO DONATE STOCK**

DONOR INFORMATION

\_\_\_\_\_  
Donor's Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

BROKER INFORMATION

\_\_\_\_\_  
Name of Donor's Broker

\_\_\_\_\_  
Name of Broker's Firm

\_\_\_\_\_  
Address of Donor's Broker

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

**LETTER OF INTENT**

The undersigned hereby directs the above-named broker to transfer the following stock

electronically\*  in certificate form to the Binghamton University Foundation as a charitable gift.

Number of shares: \_\_\_\_\_

Name/Symbol of stock: \_\_\_\_\_

If transfer will occur electronically\*:

From account number: \_\_\_\_\_

Estimated date transaction will occur: \_\_\_\_\_

\* For electronic stock transfers, transfer shares to: **DTC # 0075, Account # 48199814**

(Name of receiving firm: LPL Financial; Name on the account: THE FOUNDATION OF SUNY AT BINGHAMTON)

It is my intent to make a stock donation to the Binghamton University Foundation to be designated as follows:

\_\_\_\_\_ .

*(Note: Undesignated gifts are applied to the Foundation's unrestricted fund to be used where the University's needs are the greatest.)*

I wish to receive joint credit with my spouse: \_\_\_\_\_  
SPOUSE FULL NAME (include former name and BU class year, if applicable)

I understand that the Binghamton University Foundation will sell this stock upon receipt.

Donor Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

**IMPORTANT:**

Please send or fax a copy of this completed form **to both:**

- **Your broker;**
- **Binghamton University Foundation**  
Attn: Kyra Schnauber, Director of Gift and Donor Records  
PO Box 6005  
Binghamton, NY 13902-6005  
(607) 777-6516 Phone  
(607) 777-2945 Fax  
[kschnaub@binghamton.edu](mailto:kschnaub@binghamton.edu)

**The Binghamton University Foundation's broker is:**

Leo O'Connor, CFP  
O'Connor Investments  
33 Riverside Drive  
Binghamton, NY 13905  
(607) 770-3800 Phone  
(800) 295-4177 Toll Free Phone  
(607) 797-9424 Fax  
[loconnor@oconnorinvestments.com](mailto:loconnor@oconnorinvestments.com)