

Gifts of Appreciated Stock/Bonds/Mutual Funds

Many alumni and friends of Marian University take advantage of various benefits of making gifts through appreciated stock or the transfer of bonds and mutual funds. These gifts allow us to continue to support our students and advance the scope and quality of a Franciscan Catholic education.

Transfer Process

1. You or your broker should contact George Mohan of KeyBanc Capital Markets at 800.233.2460 or 216.689.7118. You can email George at gmohan@key.com or send a fax to 216.689.8282. Please provide the following information:
 - a. Marian University DTC Participant # 0443
 - b. Marian University Account RF4405500
 - c. Marian University Federal Tax ID # 35-0868175

2. Please provide KeyBanc Capital Markets with the following information to expedite verification of your transfer:
 - a. Donor's name
 - b. Name of stock
 - c. Number of shares
 - d. Date of transfer
 - e. Contact person from your financial institution for follow up
 - f. CUSIP number, if available

3. Marian University will provide a gift acknowledgement letter upon verification from KeyBanc Capital Markets of the transfer. The value is determined by the number of shares times the weighted average price of trades on the day the stock is received.

Process last revised 12-28-2015