

# Virginia Tech Foundation, Inc.

## Mutual Fund Gift Processing Transfer Instructions

**WARNING: Mutual funds do not move as quickly as stocks do and may take from a few days to a few weeks to transfer.**

**PRIOR TO MAKING A TRANSFER OF MUTUAL FUNDS**, the Foundation will contact our broker to confirm that the Mutual Fund can be transferred in from the donor's broker/fund. If it can be transferred in, the Foundation and/or our broker will contact the delivering broker/fund and/or donor with the delivery instructions.

### DELIVERING BROKER/FUND GIFT DETAILS:

DELIVERING MUTUAL FUND COMPANY: \_\_\_\_\_

BROKER/MANAGER NAME: \_\_\_\_\_

BROKER/MANAGER PHONE NUMBER: \_\_\_\_\_

BROKER/MANAGER EMAIL ADDRESS: \_\_\_\_\_

MUTUAL FUND NAME: \_\_\_\_\_

MUTUAL FUND CUSIP/TICKER: \_\_\_\_\_

MUTUAL FUND UNITS: \_\_\_\_\_

DONOR NAME/TELEPHONE NUMBER: \_\_\_\_\_

THIS GIFT SHOULD BE APPLIED TOWARDS: \_\_\_\_\_

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**Please fax a copy of the completed form to the Office of Investments and Debt Management at 540-231-7751 or email to [stockgifts@vtf.org](mailto:stockgifts@vtf.org)** All questions may be directed to the Office of Investments and Debt Management at (540) 231-7094.

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