



## FIDELITY INVESTMENTS STOCK TRANSFERS

### GIVING A CERTIFICATE

If the donor gives IWU the actual stock certificate the following must happen:

- The donor must sign the back of the certificate, exactly how it appears on the front of the certificate and the signature must be Signature Guaranteed.
- The space between the words "appoint" and "attorney" needs to be filled in with ***National Financial Services LLC***.
- A Certificate Release Request Form completed by the donor needs to accompany the stock certificate.
- Send by Certified or Priority Mail to:

Fidelity Investments  
100 Crosby Parkway  
Mail Zone KC1N  
Covington, KY 41015

### GIVING VIA A BROKERAGE TRANSFER

Our account registration at Fidelity is: **Indiana Wesleyan University**

Our account number is: **Z41-383724**

Fidelity's DTC# is: **0226**

### QUESTIONS?

Call or email the Office of Advancement anytime!

[advancement.services@indwes.edu](mailto:advancement.services@indwes.edu) | 765-677-1439