



GIFTS OF SECURITIES INFORMATION

Thank you for your gift to LMU to help invest in the encouragement of learning, the education of the whole person, the service of faith, and the promotion of justice.

TO MAKE A GIFT OF SECURITIES:

Please transfer stock directly to Loyola Marymount's securities firm, Northern Trust, using this specific information:

LMU's Federal Tax ID Number: 95-1643334
LMU's Account #: 26-92321 at Northern Trust
DTC#: 2669 at Northern Trust
Agent Bank ID #: 20290 at Northern Trust

Note: The date of the gift is the date that the gift is transferred to LMU's account.

Northern Trust Contact Information:

Fausto Ponce, Account Manager
Northern Trust
50 South LaSalle Street, B-8
Chicago, IL 60603-1008
(312) 444-7901 (T)
(312) 557-2673 (F)
FP18@ntrs.com

PLEASE EMAIL OR FAX A LETTER OF INSTRUCTION TO:

Alma Vorst, Senior Director, University Relations Services
Loyola Marymount University
One LMU Drive, Suite 2800
Los Angeles, CA 90045-2659
(310) 338-4567 (T)
(310) 338-5397 (F)
avorst@lmu.edu

LMU Tax Status Information

Loyola Marymount University is a charitable institution of higher education with a section **501(c)(3)** and a **509(a)(1)**.
The **Federal Tax Identification number for LMU is #95-1643334**.

TO MAKE A GIFT OF MUTUAL FUNDS: Please note that the information above is for gifts of securities **ONLY**. If you have mutual funds to contribute- identified by a five letter ticker symbol that always ends in 'X', please contact Caroline Wilhelm in the University Treasurer Office at caroline.wilhelm@lmu.edu or 310-568-6688, as soon as possible.

LETTER OF INSTRUCTION TO SEND TO LMU

Please email or fax this [letter of instruction](#) to:

Alma Vorst, Senior Director, University Relations Services

Loyola Marymount University, University Hall, One LMU Drive, Suite 2800, Los Angeles, CA 90045-2659

Tel: 310-338-4567

Fax: 310-338-5397

email: avorst@lmu.edu

Donor Names(s): _____

Phone: _____ Email: _____

Donor's Brokerage Firm: _____

Name of Donor's Broker: _____

Broker's Phone: _____ Broker's Fax: _____

DONOR'S INSTRUCTIONS:

I/We wish to make a charitable gift to Loyola Marymount University, designated for the following purpose:

LMU's Greatest Needs (Unrestricted)

Scholarship Support

Other _____

I/We are transferring _____ (#) SHARES of _____ (name) STOCK

from my/our ACCOUNT # which is _____

[Please transfer stock directly to Loyola Marymount's securities firm, Northern Trust, as follows:](#)

LMU's Federal Tax Identification Number: 95-1643334

LMU account #: 26-92321 at Northern Trust

DTC #: 2669 at Northern Trust

Agent bank ID: 20290 at Northern Trust

Note: The date of the gift is the date that the gift is transferred into LMU's account.

Northern Trust Contact Information:

Financial Advisor: Fausto Ponce
Account Manager
312-444-7901
FP18@ntrs.com

Address: Northern Trust
50 South LaSalle Street
Chicago IL, 60603
Fax: 312-557-2704

TO MAKE A GIFT OF MUTUAL FUNDS: Please note that the information above is for gifts of securities ONLY. If you have mutual funds to contribute - identified by a five letter ticker symbol that always ends in an 'X' - please contact Caroline Wilhelm in the University Treasurer Office at caroline.wilhelm@lmu.edu or 310.568.6688 as soon as possible.

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CASH WIRE TRANSFER INFORMATION

Thank you for your gift to LMU to help invest in the encouragement of learning, the education of the whole person, the service of faith and the promotion of justice.

TO MAKE A GIFT VIA A WIRE TRANSFER:

Please transfer the funds directly into the LMU's account using this specific information:

Bank of America: 555 S. Flower St., Suite 800, Los Angeles, CA 90071-2385
ABA #: 121000358
Account Number: 14175-50435
***SWIFT Code:** BOFAUS3N * for wires coming from a country outside the US
Name of Account: Loyola Marymount University; General Account
Bank Contact: Lawrence Pan
Phone Number: 888-715-1000 Ext. 63010

PLEASE ALSO MAIL, EMAIL OR FAX A COPY OF THE LETTER OF INSTRUCTION TO:

Alma Vorst, Senior Director, University Relations Services
Loyola Marymount University
One LMU Drive, Suite 2800, Los Angeles, CA 90045-2659
Tel: 310-338-4567 Fax: 310-338-5397 email: avorst@lmu.edu

LMU TAX STATUS INFORMATION

Loyola Marymount University is a charitable institution of higher education with a section **501(c)(3)** and a **509(a)(1)**. LMU is also fully accredited by the Western Association of Schools and Colleges (WASC).

The **Federal Tax Identification number for LMU is #95-1643334.**

A **W-9 Request for Taxpayer ID# and Certification** form is available upon request.