HOW TO MAKE GIFTS OF CASH and STOCK via WIRE & ELECTRONIC TRANSFERS TO ILLINOIS INSTITUTE OF TECHNOLOGY

ELECTRONIC FUND TRANSFERS (Domestic & International)
When making a gift of cash to Illinois Institute of Technology by wire transfer, please contact Melissa Lee, Senior Director, Advancement Services, at 312.567.7145 or leem@iit.edu.

AUTOMATED CLEARING HOUSE (ACH) TRANSFER
You can transfer funds to Illinois Institute of Technology via ACH as follows:

<table>
<thead>
<tr>
<th>ACCOUNT NAME:</th>
<th>Illinois Institute of Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCOUNT NUMBER:</td>
<td>46608210</td>
</tr>
<tr>
<td>ACH TRANSIT/ROUTING NUMBER:</td>
<td>021052053</td>
</tr>
<tr>
<td>Bank Address:</td>
<td>PNC Bank</td>
</tr>
<tr>
<td></td>
<td>500 First Ave.</td>
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<tr>
<td></td>
<td>Pittsburgh, PA 15219</td>
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TRANSFER COMMON STOCK
This is the most common and expedient way to make a gift of stock.

1. **Call your broker.** Let him or her know of your intent to transfer stock to an account in IIT’s name. Tell your broker the type of stock and number of shares you would like to transfer. Notify your broker that **your name must accompany the stock transfer.**

2. **Confirm your telephone call to your broker in writing;** this letter is called a confirmation letter. The confirmation letter should restate all of the above information, as well as the approximate value of your stock gift to IIT. The SEC has instructed brokers to use this procedure in making stock transfers. Reiterate that your name must be attached to your gift.

3. **Send a copy of the confirmation letter** to your contact in the Office of Institutional Advancement, or to:
   - Melissa Lee, Senior Director, Advancement Services
   - Illinois Institute of Technology
   - 10 West 35th Street, Suite 1700, Chicago, IL 60616-3793
   - 312.567.7145 / leem@iit.edu
This helps us credit your gift correctly when the transfer is complete. The date the stock is transferred to IIT’s account will become the gift date and will provide the basis for valuation.

4. Your broker will wire the gift to IIT’s account at Pershing, LLC. Give him or her the following information and make sure your broker includes your name with the wire transfer:

   **IIT’S BROKER:** Bank of New York/Pershing
   500 Grant Street, Suite 0475 Pittsburgh, PA  15258
   Attn: Jorja Watts
   Phone: 412.234.0439

   **BANK of NY/Pershing DTC NO.:** 0443

   **IIT’S ACCOUNT NO./NAME:** N7M100228 / Illinois Institute of Technology

**IMPORTANT:** Please notify your contact at IIT of the transfer. This will enable him or her to track the transaction with the broker.

**MAIL STOCK CERTIFICATES**
This two-step procedure for mailing certificates prevents theft and insures you against loss through the mail.

1. Mail **unsigned** stock certificates to IIT by registered mail only.

2. In a **separate** registered mail package, send a signed (exactly as your name is printed on the certificate) stock power (copy attached) that transfers ownership of the stock to IIT. The postmark date of the stock power package will be the date of the gift. We recommend using the U. S. Postal Service to avoid confusion.

3. Gifts of stock should be addressed as follows:
   Melissa Lee, Senior Director, Advancement Services
   Illinois Institute of Technology
   10 West 35th Street, Suite 1700, Chicago, IL  60616-3793
   312.567.7145 / leem@iit.edu
HAND-DELIVER STOCK CERTIFICATES

1. Stock may be delivered to IIT in person. However, you must sign the stock certificates and have your signature “medallion guaranteed” at your bank. Certificates should be signed on the back exactly as your name is printed on the certificate and they must be dated. Write “Illinois Institute of Technology” in the space provided to indicate IIT as the new owner of the stock. The day the stock is received at IIT will be the date of the gift and valuation.

2. You may bring stock certificates in person to:
   Melissa Lee, Senior Director, Advancement Services
   Illinois Institute of Technology
   10 West 35th Street, Suite 1700, Chicago, IL  60616-3793
   312-567-7145 / leem@iit.edu

Other Considerations When Making a Gift of Stock

A. Valuation
   The IRS has ruled that the date of the gift is the date when IIT becomes the irrevocable owner of the stock. This date is then used to determine the value of the stock gift.

   For publicly traded, listed stock, the valuation is the mean or average of the stock’s high and low price on the date of the gift.

   Acceptance of international stock, restricted securities, closely held or non-publicly traded securities must be approved by the AVP Finance & Controller before they are accepted by IIT due to the difficulty of sale and establishment of fair market value.

B. IRS Tax Forms
   If your gift of stock is valued over $500, you will need to report it on an IRS Form 8283 "Non-Cash Gifts" when you file your taxes. Your tax advisor can help you with this.

C. For information on making gifts of securities, please contact:
   Melissa Lee, Senior Director, Advancement Services
   Illinois Institute of Technology
   10 West 35th Street, Suite 1700, Chicago, IL  60616-3793
   312.567.7145 / leem@iit.edu
**GIFTS OF MUTUAL FUNDS**

Charitable gifts of mutual fund shares confer the same tax benefits as gifts of individual stock, but there are distinctions between mutual funds and other stocks, and those differences need to be taken into account when donating mutual fund shares. You should contact your account representative at the mutual fund company regarding the process of making a gift of mutual fund shares.

In addition, you should notify Melissa Lee, Senior Director, Advancement Services, of your interest in making a gift of mutual fund shares and provide the mutual fund CUSIP or symbol, the number of shares, and the contact information of the account representative at the mutual fund company.

IIT will then check with its broker to determine whether it has an existing account with the mutual fund company into which the mutual fund shares may be transferred. If IIT’s broker does not have such an arrangement with the mutual fund company, then your broker will need an account for IIT at your brokerage firm. To do this, you will need to provide IIT’s **Tax ID Number 36-2170136** to your broker. If your broker needs further information, he or she may contact Melissa Lee, Senior Director, Advancement Services (leem@iit.edu / 312.567.7145).

When it is confirmed that an account is available for the transfer of mutual fund shares, then you may instruct the mutual fund company to transfer the shares. The mutual fund company may have a required form for directing the transfer of the shares, and this may require a signature guarantee.

If we know that a gift is in process, we can call the mutual fund company and check on whether the gift has been received in our account.

**IMPORTANT:** This process can take two to four weeks to complete. Please keep this in mind if you are making this type of gift toward the end of the calendar year. We recommend beginning the transfer before Thanksgiving if the year of the contribution is important.
FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign and transfer to

______________________________________________________________

______________________________________________________________

IF STOCK, COMPLETE THIS PORTION:

______ shares of the ________ stock of _____________________________
represented by Certificate(s) No.(s) ________________________________
inclusive, standing in the name of the undersigned on the books of said Company.

IF BONDS, COMPLETE THIS PORTION:

_________________ bonds of ______________________________
in the principal amount of $________, No.(s) ___________________________ inclusive
standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint ________________________________
_____________________________ attorney to transfer the said stock or bond(s) as the case may
be, on the books of said Company, with full power of substitution on the premises.

SIGN HERE ONLY __________________________

Dated ______________________________

MEDALLION SIGNATURE GUARANTEE: ______________________________

Dated ______________________________

Please address to: Melissa Lee, Sr. Director, Advancement Services, Illinois Institute of Technology, 10 West 35th Street, #1700, Chicago, IL 60616