

How to Give Mutual Funds

Unlike DTC-eligible securities, which may be exchanged almost simultaneously between two legal entities, transferring ownership in a mutual fund requires special handling to complete (as they cannot be transferred under the universal DTC transfer method).

If you wish to give shares of a mutual fund, please contact the KSU Foundation at 785-775-2114 or email SecuritiesGifts@ksufoundation.org to discuss your intention to give mutual funds. We are ready to work with you to complete the transaction. In order to better facilitate our conversation, please obtain the following information for our conversation:

1. **What mutual fund(s) are you planning to give? For each type please indicate:**
 - Fund Name:
 - Fund Ticker Symbol:
 - Number of Shares/Units:

2. **Where are your funds held?**
 - Financial Institution Name:
 - Broker/Advisors Name:
 - Broker/Advisors Phone Number:

3. **Where/How would you like your gift allocated?**

Our team has active accounts in many of the largest and most active financial institutions. After our team receives the above information, we will provide you and your advisor with the best account number and routing instructions to complete the transfer. Following these instructions is important to the foundation receiving and processing your gift in a timely manner.

If you have any questions throughout the process, please contact our team at 785-775-2114 or email SecuritiesGifts@ksufoundation.org