



# SECURITIES TRANSFER INSTRUCTIONS

To transfer securities to Paul Smith's College, please follow these steps:

1. Fill out this form, and forward it to your financial advisor.
2. Send a copy of this form to Paul Smith's College Advancement at [collegeadvancement@paulsmiths.edu](mailto:collegeadvancement@paulsmiths.edu). (Donor information is not always provided to PSC when securities are transferred.)

DATE

TO (DONOR'S FINANCIAL ADVISOR)

TELEPHONE

EMAIL

Please use this form as authorization to transfer the securities listed below from my account to Long Run Wealth Advisors, LLC as my gift to Paul Smith's College.

FROM (DONOR NAME)

EMAIL

TELEPHONE

NAME OF SECURITY

NUMBER OF SHARES

GIFT ALLOCATION: FUND NAME

SIGNATURE



For Paul Smith's College recording purposes, I request this transaction to stay anonymous.

## QUESTIONS?

Please contact Paul Smith's College at (518) 327-6315 or email [collegeadvancement@paulsmiths.edu](mailto:collegeadvancement@paulsmiths.edu).

## Securities Transfer Instructions for Financial Advisors

For gifts of securities to Paul Smith's College, please deliver by DTC to:

Raymond James & Associates  
DTC # 0725  
Attn: Long Run Wealth Advisors, LLC  
55 Barn Road, Suite #206  
Lake Placid, NY 12946  
Phone (518) 523-8050  
Fax (518) 375-8266  
Paul Smith's College Account #:  
601P7050  
Federal ID #: 15-0533545

## IMPORTANT

For proper donor recognition, securities transfers must include:

- Donor's name and contact information
- Name of security and number of shares
- Allocation of gift