Asset Transfer Instructions for Gifts of Stock
Otterbein University
Effective January 10, 2011

Step 1. Notify Otterbein
Before the transfer takes place, please take a moment to notify Kate Billy, Director, Donor Relations, in the Otterbein University Office of Institutional Advancement:

Tel: (614) 823-1952 Otterbein University
Fax: (614) 823-1905 1 South Grove Street
kbilly@otterbein.edu Westerville, OH 43081

Otterbein cannot process your gift of securities unless we know the identification of the donor.

Step 2. Provide this information to your broker (DTC transfers)
Your broker will need the following information about Otterbein’s account at:

RBC Wealth Management
Two Portland Square, 5th Fl.
PO Box 17600
Portland, ME 04112
Attn: Beth Kelly
Tel: 207-756-6150
Tel: 800-341-0336
Fax: 207-871-1778
Email: bethany.kelly@rbc.com

Otterbein University Taxpayer Identification No. 31-4379532
DTC Participant Account Number: 0235
Reference: Account: 30957776
Further Reference: Otterbein University/Donor’s Name

Instructions for Transfer of Physical Stock or Mutual Fund Shares
To obtain information on transferring a physical stock certificate or mutual or fund shares to Otterbein, please contact Anne Krieger, Controller, in the University Business Office, at 614-823-1354 or akrieger@otterbein.edu.