



Stock Transfer Form

This form is provided to offer instructions and allow CARA to accurately account for a transfer of securities. Prior to the transfer of securities, please email or fax this form to Audrey.Boehm@sdsmt.edu 605-394-6679 (fax)

SECTION A: Donor Information

Name: _____ Preferred Phone: _____
Phone Type (circle one): Cell Work Home

Address: _____ City, State ZIP: _____

Gift Designation: _____

SECTION B: Securities Information

Estimated Date of Transfer: _____ Estimated Value of Transfer: _____

Name and Type of Security: _____ Number of Shares: _____
(For example: IBM common stock)

Name and Type of Security: _____ Number of Shares: _____

Name and Type of Security: _____ Number of Shares: _____

Broker Name: _____ Broker Company: _____

Broker Phone Number: _____ Broker Email: _____

SECTION C: Transfer Instructions for South Dakota Mines CARA

Broker Information

Charles Schwab & Co., Inc.
PO Box 628290
Orlando, FL 32862-8290
Phone Number: 602-355-9003
Fax Number for Asset Transfers: 877-824-3817

SD Mines CARA Account Information

Legal Name: South Dakota School of Mines & Technology Center for Alumni Relations & Advancement
Account Name: S.D.S.M.T. Foundation
DTC Number: 0164, Code 40
Account Number: 8357-1823
Tax ID#: 46-6011771

After South Dakota Mines CARA receives the securities, an official acknowledgement letter will be issued to the donor.

Contact Audrey Boehm, Director of Financial Services, with any questions
Audrey.Boehm@sdsmt.edu or 605-394-5304
South Dakota Mines Center for Alumni Relations & Advancement (CARA)
330 East Kansas City Street, Rapid City, SD 57701