



Virginia Tech Foundation, Inc.

**Mutual Fund Gift Processing Transfer
Instructions**

October 25, 2024

Notice: Please be aware that mutual funds typically require more time to transfer than stocks, with processing times ranging from a few days to several weeks.

Before initiating a mutual fund transfer, the Virginia Tech Foundation will first confirm with its broker whether the mutual fund can be accepted from the donor's broker or fund. If the transfer is feasible, Foundation staff or its broker will provide the necessary delivery instructions to the delivering broker, fund, or donor.

DELIVERING BROKER & FUND GIFT DETAILS:

DELIVERING MUTUAL FUND COMPANY:	
BROKER/MANAGER NAME:	
BROKER/MANAGER PHONE NUMBER:	
BROKER/MANAGER EMAIL ADDRESS:	
MUTUAL FUND NAME:	
MUTUAL FUND CUSIP/TICKER:	
NUMBER OF MUTUAL FUND UNITS/SHARES:	
DONOR NAME, PHONE NUMBER, & EMAIL ADDRESS:	
THIS GIFT SHOULD BE APPLIED TOWARDS:	

Please email a copy of the completed form to Treasury Services at stockgifts@vtf.org or fax to 540-231-7751. All questions may be directed to Treasury Services at (540) 231-7094.

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