



## Fund Transmittal Letter

**IMPORTANT NOTICE** when transferring stock to Montreat College: Due to federal, state and local privacy statutes currently enforced, often your broker may not provide us with any personal information, including your name. The only information that comes to Montreat College with your transfer may be the name of the security, number of shares, and firm initiating the transfer. *To ensure your gift is properly credited, receipted and acknowledged, this form should be delivered or emailed to your broker AND to Montreat College at:*

Garrett Luck  
Vice President for Advancement  
PO Box 1267, Montreat, NC 28757  
garrett.luck@montreat.edu  
[W] 828-419-2107 / [C] 360-320-0498

### DONOR INFORMATION

Donor's Name	
Address	
Phone	
Request Date	

### BROKER INFORMATION

Broker's Name	
Broker's Firm	
Address	
Phone	

**TO THE ABOVE-NAMED BROKER:** Upon receipt of this letter, please transfer the following as a charitable gift to Montreat College:

#of Shares & Name of Stock \_\_\_\_\_

Mutual Funds \_\_\_\_\_

401K Funds Transfer \_\_\_\_\_

Retirement Distribution \_\_\_\_\_

Charitable gift designation:  Keystone Scholarship Fund  
 Strategic Growth  
 Other (please specify) \_\_\_\_\_

**Johnson Asset Management**  
3777 West Fork Road  
Cincinnati, OH 45247

**Contacts**  
Michelle McGinnis  
513-661-3100 x1261  
mmcginnis@johnsonasset.com

**Account#:** 3171-2767  
**DTC#:** 0164