



Delivery Instructions for the University of Puget Sound Via Principal

Below you will find instructions for how to transfer stock to the University of Puget Sound. When you have determined how many shares and what type of stock you will transfer, please alert the university staff member with whom you are working, or contact Amelia Hooper, Director of Prospect and Information Management, at (253) 879-3909 or ahooper@pugetsound.edu, so our bank can be notified to accept the funds. Thank you for your gift!

DTC Eligible Securities (Stocks and Mutual Funds):

Participant (DTC): #2925

Agent Bank ID: #78861

Principal Account: #25794901

Account Name: The University of Puget Sound-Gift

Other Notes: "Donor Name" & "Gift Designation"

Name of Bank:

Principal Custody Solutions

510 N. Valley Mills Drive, Suite 400

Waco, TX 76710

PCSTexasCSC@Principal.com

Incoming Fed Cash Wire Instructions (Domestic/International) (Cash

Donations): Bank Name Wells Fargo Bank, N.A.

Bank Phone 206.292.3606

Bank Address 999 Third Ave., Seattle, WA 98104

Swift Code WFBIUS6S

Routing # (ABA #) 121000248

Account Name The University of Puget Sound General Account Account Number

4122062649

Message to Beneficiary (OBI) Please provide donor name and gift designation

Mutual Funds:

Mutual Funds are complicated transfers and usually require 6 weeks (or longer) to officiate. For delivery instructions, please contact Amelia Hooper at ahooper@pugetsound.edu.

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