



## INFORMATION ON THE TRANSFER OF SECURITIES AND CASH TO SMU

It may be to your advantage to maximize the tax benefits of making charitable giving by using appreciated securities to make your gifts.

Please notify the **Office of Gift Planning** when transferring assets or cash at [giftplanning@smu.edu](mailto:giftplanning@smu.edu) and (214) 768-1911.

**To transfer securities to SMU**, please use the following transfer instructions:

State Street Global Management  
Southern Methodist University (Gift Securities)  
Account # AB2037174  
DTC # 0226  
Contact: SMU Office of the Treasurer  
6116 N. Central Expressway, Suite 1210, Dallas, Texas 75206  
Attention: Weston Hebert  
Email: [phebert@smu.edu](mailto:phebert@smu.edu)  
Phone: (214) 768-2403 or (214) 768-2802

**NOTE: Please ask your broker to include the donor name when submitting transfer instructions.**

**To transfer U.S. Treasuries to SMU**, please use the following transfer instructions:

Chase Manhattan Bank  
NYC/NFSC  
ABA # 0210-0002-1  
Account # 066196-221  
State Street Global Management  
FCC: Southern Methodist University (Gift Securities) #AB2037174

**To transfer cash to SMU**, please utilize the following transfer instructions (US only, if this is International, please contact the Office of Gift Planning for additional instructions)

Bank of America SMU Gift Account  
Account # 375-161-9802  
Routing # for ACH: 111000012  
Routing # for WIRE: 026009593