



**To transfer securities to Paul Smith's College, please follow these steps:**

1. Fill out this form, and forward it to your financial advisor.
2. Send a copy of this form to Paul Smith's College at [sfrederick@paulsmiths.edu](mailto:sfrederick@paulsmiths.edu). **(Donor information is not always provided to PSC when securities are transferred.)**

\_\_\_\_\_  
DATE

\_\_\_\_\_  
TO (DONOR'S FINANCIAL ADVISOR)

\_\_\_\_\_  
TELEPHONE

\_\_\_\_\_  
EMAIL

Please use this form as authorization to transfer the securities listed below from my account to Long Run Wealth Advisors, LLC as my gift to Paul Smith's College.

\_\_\_\_\_  
FROM (DONOR NAME)

\_\_\_\_\_  
EMAIL

\_\_\_\_\_  
TELEPHONE

\_\_\_\_\_  
NAME OF SECURITY

\_\_\_\_\_  
NUMBER OF SHARES

\_\_\_\_\_  
GIFT ALLOCATION: FUND NAME

\_\_\_\_\_  
SIGNATURE

**QUESTIONS?**

Please contact Paul Smith's College at (518) 327-6315 or email Steve Frederick at [sfrederick@paulsmiths.edu](mailto:sfrederick@paulsmiths.edu).

**Securities Transfer Instructions for Financial Advisors**

For gifts of securities to Paul Smith's College, please deliver by DTC to:

Raymond James & Associates  
DTC # 0725  
Attn: Long Run Wealth Advisors, LLC  
55 Barn Road, Suite #206  
Lake Placid, NY 12946  
Phone (518) 523-8050  
Fax (518) 375-8266  
Paul Smith's College Account #:  
601P7050  
Federal ID #: 15-0533545

**IMPORTANT**

For proper donor recognition, securities transfers must include:

- Donor's name and contact information
- Name of security and number of shares
- Allocation of gift

For Paul Smith's College recording purposes, I request this transaction to stay anonymous.