



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:*

Myles Fish
Vice President for Advancement
PO Box 1267, Montreat, NC 28757
myles.fish@montreat.edu
[W] 828-419-2107 / [C] 616-402-5920

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