



**BETA THETA PI**  
FOUNDATION

**DELIVERY INSTRUCTIONS FOR WIRE STOCK TRANSFERS  
TO BETA THETA PI FOUNDATION**

DTC (Depository Trust Company) #0164 Code 40  
(Charles Schwab & Co., Inc)

FBO: Account Number: 4919-6335 (Beta Theta Pi Foundation)  
Tax ID Number 80-0296934

**Account Address:** Charles Schwab & Co., Inc  
Attn: IST 9  
PO Box 628290  
Orlando, FL 32862

**Charles Schwab & Co., Contact:**  
Rachel Lasure, 877-553-7699

**IMPORTANT:**

***Please inform Laura Lednik at 800.800.2382 and let her know which securities are being transferred, # of shares, and which fund to apply them to upon receipt.***

**Beta Foundation Contacts:**

Laura Lednik, Director of Development – Beta Theta Pi Foundation  
Phil Fernandez, Chief Foundation Officer – Beta Theta Pi Foundation  
Jonathan Brant, Director – Beta Theta Pi Foundation  
David Greis, Director of Advancement –Beta Theta Pi Foundation  
Koby Harrington, Director of Advancement –Beta Theta Pi Foundation  
Dan Fogle, Director of Business Operations/Finance – Beta Theta Pi

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