



# 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 (513) 523-7591 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  
Uri Ormsby, Chief Finance Officer – Beta Theta Pi

*Beta Theta Pi Foundation  
5134 Bonham Road  
P.O. Box 6277  
Oxford, OH 45056  
800.800.2382  
FAX 513.523.2381  
[beta@beta.org](mailto:beta@beta.org)*