



## University of Pennsylvania | Securities Transfer Form

### Section I This is a request to

- I wish to donate shares of stock to the University of Pennsylvania.  
 Shares can be transferred directly from your brokerage account to Penn's account at Morgan Stanley. Please complete the form and send it to your broker to initiate the transfer and forward a copy of the form to the Securities Office via email to [StockGifts@lists.upenn.edu](mailto:StockGifts@lists.upenn.edu) or fax 215-573-5118.
- I wish to donate mutual funds or other types of financial instruments to the University of Pennsylvania. Please contact or ask your broker to contact the University of Pennsylvania Securities Office at 215-898-7254 for further information.

### Section II Donor Information

Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

If Penn alumna/us: Degree year \_\_\_\_\_ School \_\_\_\_\_

### Section III Gift Information

Broker/Advisor Name \_\_\_\_\_ Telephone \_\_\_\_\_

Brokerage Firm \_\_\_\_\_

# of Shares	Security Description	Ticker Symbol	Gift Designation

### Section IV Security Instructions

**Firm:** Morgan Stanley Private Wealth Management  
 Attention: The Corcoran Ciarelli Group, Telephone: 610-260-8526

**DTC:** 0015

**Customer Name:** University of Pennsylvania

**Account Number:** 858-010018

**Tax ID:** 23-1352685

**Reference:** Donor's Name

#### **Penn Contact Information:**

Email: [StockGifts@lists.upenn.edu](mailto:StockGifts@lists.upenn.edu) Telephone: 215 898-7254 | Fax: 215-573-5118  
 2929 Walnut Street, Suite 300  
 Philadelphia, PA 19104-5099

**For the University to properly identify your gift, you or your broker should notify the Securities Office of your upcoming gift transfer and leave your full name in the Reference field.**