



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 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 _____ Phone Number _____

Brokerage Firm _____

# of Shares	Security Description	Ticker Symbol	Gift Designation

Section IV Security Instructions

Firm: Morgan Stanley Private Wealth Management
 Attention: Kristine Hankins, telephone: 610-260-8531

DTC: 0015

Customer Name: University of Pennsylvania Tax ID: 23-1352685

Account Number: 858-010018

Reference: Donor’s name

Penn Contact Information:

Email/Telephone/Fax email: STOCKGIFTS@LISTS.UPENN.EDU telephone: 215-898-7254 fax: 215-573-5118

Address: 2929 Walnut Street, Suite 300
 Philadelphia, PA 19104-5099

In order for the University to properly credit the gift, it is important that you or your broker notify the Securities Office of the gift.