HOW TO MAKE GIFTS OF SECURITIES AND ELECTRONIC TRANSFERS

WHAT TO DO: 3 SIMPLE STEPS

When you want to make an electronic transfer of securities to benefit a fund, department or program area at UW Medicine, please follow the steps below. This process will put your brokerage in contact with the University of Washington's Treasury Office, and Alana Askew will handle the transfer.

1. **WRITE.** Please write a letter/directive to your broker directing the transfer (not sale) of a specific number of shares in a particular company. Include this information:

Account Name: University of Washington

Account No.: #144-153275-535

Detail: The name of the fund(s), department(s) or program(s) that will benefit from the gift.

Brokerage Firm: Morgan Stanley Wealth Management

999 Third Avenue, Suite 4500

Seattle, WA 98104

DTC: #0015

UW Contact: Alana Askew, 206.685.3814

Joint account? Both account owners must sign the letter/directive.

Note: You can contribute stock from several companies held within the same account. You can also make a single transfer for multiple purposes.

Please make two copies of the letter or directive. Send one copy to Alana Askew at the University of Washington (UW). Send the other copy to your gift officer at UW Medicine Advancement. The addresses are below.

- 2. **CALL.** On the day you mail your letter or directive, please call Alana Askew at 206.685.3814 to let her know the gift is coming, and what fund, department or program will benefit. This will prevent gifts from remaining *unidentified* and will help us follow up on transfers not received when expected.
- 3. **CHECK.** Please check with your broker soon after sending the letter/directive to ensure that the transfer is complete, especially if you initiate this gift shortly before Dec. 31.

FOR YOUR INFORMATION

- In the UW's records, the gift value will be recorded as the mean of the high and low values on the gift date.
- The UW will send a receipt and acknowledgment as soon as possible after the transaction is complete.
- Need other delivery options? Contact Alana Askew at 206.685.3814.

The University of Washington

Alana Askew, Operations Analyst 206.685.3814 (phone), 206.543.3698 (fax), alana01@uw.edu

University of Washington Treasury Office, Box 354998 4311 11th Avenue NE, Suite 600

Seattle, WA 98105

UW Medicine Advancement

Main line: 206.543.5686

Attn.: Your Gift Officer's Name UW Medicine Advancement

Box 358045

Seattle, WA 98195-8045

LW Medicine

UW Medicine Advancement