



Department of Planned & Leadership Gifts

TRANSFERRING STOCK TO MESSIAH UNIVERSITY

SECURITIES HELD BY YOUR BANK OR BROKER

Send written instructions to your bank or broker regarding (1) the number of shares of each security you wish to give and (2) the purpose for which these funds are to be used. Securities can be transferred directly to the Messiah University Donation Fund at Morgan Stanley, Account #341-899851. Please specify with your broker to include your name when transferring securities to Messiah University. Contact Craig McLean or Leigh Beshaw at (717) 255-6653. Please copy a letter of your instructions to Robert Brown at the following address:

CONTACTS:

Robert O. Brown, CFP®
Senior Director of Charitable Services
Messiah University
One University Avenue
Mechanicsburg, PA 17055
(717) 796-5051
bbrown@messiah.edu

Craig McLean (Broker for Messiah University)
Morgan Stanley Smith Barney, Inc.
214 Senate Avenue, 7th floor
Camp Hill, PA 17011
(717) 730-1870 (direct); (717) 255-6653 (Leigh Beshaw)
DTC # 0015 (for Morgan Stanley, Inc.)

Kimberly Hawkins
Director of Budget and Accounting
Messiah University
One University Avenue
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(717) 796-1800 ext. 2752
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OTHER INFORMATION

Messiah University Donation Fund
Account # #341-899851
Messiah University Federal Tax I.D. #23-1352661

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