



To transfer securities to Paul Smith's College, please follow these steps:

1. Fill out this form, and forward it to your financial advisor.
2. Send a copy of this form to Paul Smith's College at sfrederick@paulsmiths.edu. **(Donor information is not always provided to PSC when securities are transferred.)**

DATE

TO (DONOR'S FINANCIAL ADVISOR)

TELEPHONE

EMAIL

Please use this form as authorization to transfer the securities listed below from my account to Morgan Stanley as my gift to Paul Smith's College.

FROM (DONOR NAME)

EMAIL

TELEPHONE

NAME OF SECURITY

NUMBER OF SHARES

GIFT ALLOCATION: FUND NAME

SIGNATURE

QUESTIONS?

Please contact Paul Smith's College at (518) 327-6315 or email Steve Frederick at sfrederick@paulsmiths.edu.

Securities Transfer Instructions for Financial Advisors

For gifts of securities to Paul Smith's College, please deliver by DTC to:

Morgan Stanley
DTC # 0015
Attn: Renee Grevelding
250 South Clinton Street, Ste. 500
Syracuse, NY 13202
Phone (800) 755-5451
Fax (315) 464-3375
Paul Smith's College Account #: 621-101314-122
Federal ID #: 15-0533545

IMPORTANT

For proper donor recognition, securities transfers must include:

- Donor's name and contact information
- Name of security and number of shares
- Allocation of gift

For Paul Smith's College recording purposes, I request this transaction to stay anonymous.