## **Securities Transfer Request Form**

Please email a copy of this completed form to josh.tews@admin.utah.edu.



Shares can be transferred directly from your brokerage account to
Utah's account. Complete the form below and send a signed copy to your broker. Only your broker can initiate the transfer. Some brokerage firms require this letter to be notarized or medallion signature guaranteed. Please check with your broker for additional requirements. If you wish to make a gift of mutual funds, bonds, foreign or restricted stock, please contact Josh Tews at (920) 257-9665 as these require special handling. Thank you!

(Brokerage Firm) (Broker Phone Number)  Please accept this letter as your authorization to irrevocably transfer: (name of stock, number of shares)  which you hold in the name of: (account title at brokerage firm)  From my account number:  To the account of the University of Utah.  Please transfer via DTC as follows:  Brokerage: Morgan Stanley Smith Barney DTC 0015  Account Name: University of Utah Account: 124-021180-021  Account Registration: University of Utah Tax ID 87-6000525  Contact: Rattana Phommalay at rattana.phommalay@ms.com or 801-578-8048  Signature(s) of account owner(s): Please provide the University of Utah with my name as donor of this gift.	DATE:	
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	Gift Designation (purpose of gift):	