



**STOCK TRANSFER INSTRUCTIONS**

**Clark's Broker:**           **Morgan Stanley**  
                                         **1 Technology Drive, Third Floor**  
                                         **Westborough, MA 01581-1774**

**Broker Contacts:**       Isabel Lopes/ Debbie Crossman/Todd  
                                         Wetzel

**Phone Number:**       (508) 870-7013 for Ms. Lopes  
                                         (508) 870-7027 for Ms. Crossman  
                                         (508) 870-7025 for Mr. Wetzel

**Fax Number:**           (508) 870-7050

**Toll Free Number:**   (888) 827-2901

**Account Number:**   521-045314

**DTC Number:**       0015

**EIN:**                   04-2111203

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After you have given these instructions to your broker, please contact University Advancement, at [giving@clarku.edu](mailto:giving@clarku.edu) , to provide the name of your broker and the name of the stock being transferred. We will confirm when the transfer has been completed.

**WIRE TRANSFER INSTRUCTIONS**

To initiate a wire transfer payment, please give your bank the following instructions.

**Payable to:**           Clark University  
                                         950 Main Street, Worcester, MA 01610  
                                         United States

**Bank:**                   TD Bank Massachusetts  
                                         370 Main Street  
                                         Worcester, MA 01608  
                                         United States

**Bank Swift Code:**   NRTHUS33XXX

**ABA No:**               211-370545

**Account No:**       824 194 1463 Clark University



### **MUTUAL FUNDS**

Mutual funds are ineligible for DTC transfer, therefore if you wish to make a gift with mutual funds, a new account must be opened with the “fund” company with Morgan Stanley as the Broker/Dealer.

To open an account with the fund company:

**Account Registration:**

Clark University  
Tax ID: 042-111-203  
Attn: Samira Menon  
950 Main Street  
Worcester, MA 01610  
(508) 904-4014

**Broker/Dealer Information:**

Morgan Stanley  
Rep Name: Todd H. Wetzel  
Rep #: 090  
1 Technology Drive, Third Floor  
Westborough, MA 01581-1774  
(508) 870-7025

Please let us know that an account has been opened with the fund company so that we are aware that a gift has been made. Please contact University Advancement at [giving@clarku.edu](mailto:giving@clarku.edu), and we will confirm when the transfer has been made to Clark.