



Securities Transfer Procedures

Tax ID# 23-1352630

Wire Transfer - Securities

Securities can be wire transferred through DTC to Drexel University's account at our broker, UBS Financial Services, Inc.

Account Name: **Drexel University**

DTC # **0221**

Account # **B1 84940**

Tax ID # **23-1352630**

Contact:

Carrie A. Cannon, CEPA

Account Vice President- Wealth Management Certified Exit Planning Advisor

UBS Financial Services, Inc.

Nastasi-Cannon Wealth Management Group 101 W. Elm Street, Suite 200

Conshohocken, PA 19428

Office: (610) 832-3029

Fax: (855) 247-4123

Carrie.cannon@ubs.com

Before the wire transfer is made, please fill out the Securities and Cash Transfer Information Document and email to: rgsgifts@drexel.edu.

Wire Transfer - Mutual Funds

If the mutual fund is DTC eligible it should be transferable through the DTC process. However, if it is not DTC eligible, your donor's broker should use the contact information, below, to get a Bank Identification Number (BIN) for the transfer.

Contact:

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Account Vice President- Wealth Management Certified Exit Planning Advisor

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Questions: Call 215.895.2612 or 215.895.1694. Thank you for our support of Drexel University and our students!