

Contributions to the Foundation:

1. **Securities:** Donor directs current custodian to transfer gift to Morgan Stanley, utilizing the following:

DTC Clearing Number: 0015
FBO: Mu Chapter of Sigma Pi Educational Foundation Inc
A/C Number: 052-156146-229

In the unlikely event that the gift is in **physical** (not book entry) form, contact Morgan Stanley prior to overnighting security.

2. **Cash:**
 - a. **Wire:** Donor instructs current custodian to wire funds to Morgan Stanley, utilizing the following:

ABA Number: 021000089
Bank: Citibank, New York
For Benefit of Morgan Stanley Smith Barney LLC
Beneficiary Account: 40611172
For Further Credit To: Mu Chapter of Sigma Pi Educational Foundation Inc
Account Number: 052-156146-229

- b. **Check:** Mail to the following address:
Morgan Stanley
1290 Avenue of the Americas
13th Floor
New York, NY 10104
Attention: Burt Hilton

3. **Credit Cards:** Donor provides Credit card number, expiration date, CVC number to Elevate. Funds are transferred from Elevate to Morgan Stanley (via ACH) at the end of each week. Elevate will inform Morgan Stanley, on a weekly basis, of all ACH transfers

At the close of each week, Morgan Stanley will provide (via email) a list of all donations received. This will include the name of the donor, the method of payment, the amount donated and the date received. The distribution list will include:

Elevate Jeff Wilkinson, Pam Costley
Sciarabba Jacqui Durling

Foundation Tom Silver, Jarett Wait, Aaron Klein
Alumni Corp John Haggerty

Considerations:

1. The Educational Foundation's **annual** and **semi-annual reports** delivered in February and June include contribution forms and envelopes, which will be addressed to Morgan Stanley. In the event that any collateral information (credit card contributions, address changes, etc.) is delivered to Morgan Stanley, Burt Hilton will have that information scanned and emailed to Elevate within 24 hours.
2. The Alumni Corp's Spring and Fall **Muse** publication also includes contribution forms and envelopes, which will be addressed to Elevate. In the event of a Foundation contribution, Elevate will send the check to Morgan Stanley or process the ACH transfer (in the event of a credit card gift) by that week's end. Elevate will notify Morgan Stanley by week's end as well.