

Gift Transfer Instructions

This information is intended to make charitable giving to CWRU as easy as possible. Please use (or provide to your broker/financial advisor) the following transfer instructions when making your gift. ***BEFORE making stock/cash wire transfers, please email or call the appropriate contact listed below and provide the donor's name(s), gift purpose, name of security, and approximate amount of gift. This will allow us to properly identify and allocate your gift.***

1. If the gift is a STOCK, BOND, EXCHANGE TRADED FUND (ETF) or a MUTUAL FUND:

Gift Account Name: Case Western Reserve University
CWRU Brokerage Firm: Vanguard Brokerage Services
CWRU Brokerage Gift Account: 26004508
DTC Number: 0062
University Tax ID: 34-1018992

Contact: CWRU Advancement Services at 216.368.8552 or stockgifts@case.edu

2. If the gift is a CASH WIRE TRANSFER:

Bank: KeyBank
Address: 127 Public Square, Cleveland, OH 44114
Bank Wire Instructions: KeyBank/Clev
ABA #: 041-001-039
SWIFT: KEYBUS33
Account: 01-002-2460
Name: Case Western Reserve University

Contact: CWRU Advancement Services at 216.368.8552 or uris-gifts@case.edu

3. If the gift is issued as a CHECK it should be mailed to:

Office of Advancement Services
Case Western Reserve University
CedarTech Building
10969 Cedar Ave. Suite #300
Cleveland, OH 44106-7035

Checks should be made payable to Case Western Reserve University or CWRU. Please indicate the purpose of your gift on the memo line of your check. If your gift is a distribution coming directly from your IRA, please indicate (or ask your IRA Administrator to indicate) that on the check or in an accompanying cover letter.

Contact: CWRU Advancement Services at 216.368.8552 or uris-gifts@case.edu

4. If you would like to make a gift ONLINE please visit: case.edu/give

IMPORTANT NOTE: If you wish to make a gift intended to fund a charitable gift annuity (CGA) or a charitable remainder/lead trust (CRT/CLT), or if you would like to make a non-cash gift of assets such as real estate, jewelry, art, collectibles, closely held business interests, etc., please contact the Office of Strategic Giving at giftplan@case.edu or by calling 216-368-4460 **BEFORE** transferring or delivering your gift.