**Stock Gift – Wire Transfer Instructions**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Broker’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Broker’s Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Brokerage Firm Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_\_\_\_\_ ZIP: \_\_\_\_\_\_\_\_\_\_**

**Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**AUTHORIZATION TO TRANSFER STOCK:**

**Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_,**

*(Broker’s Name)*

**Please accept this letter as your authorization to deliver immediately via: Morgan Stanley Private Wealth Management DTC#0015 – Parish Episcopal School *Operating Account* A/C 369-148607-071; a gift to Parish Episcopal School.**

**Mr./Mrs./Ms. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ wishes to donate \_\_\_\_\_\_\_\_\_\_\_\_ shares of**

**common stock of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. CUSIP # \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*(Company Name)*

**Gift Designation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*(Area the gift is supporting; example: Parish Fund, Campaign, Gala)*

**BROKER’S INSTRUCTIONS:**

Please transfer the stock over the DTC wire to Morgan Stanley Private Wealth Management. *(It may help facilitate the transfer if you call Kevin Dickey or Diana Nunez, to let them know that you are ready to transfer the shares.)*

**Morgan Stanley Private Wealth Management**

**Account: 369-148607-071**

**DTC #: 0015**

**Kevin Dickey**

**Phone:** 972.774.6759

**Email:** kevin.dickey@morganstanleypwm.com

**Diana Nunez**

**Phone:** 972.774.6763

**Email:** diana.nunez@morganstanleypwm.com

Thank you for your prompt attention to this matter.

**Sincerely,**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*(Please print your name in full)* *(Donor’s Signature)*

**To ensure proper acknowledgment of your gift of securities,**

**please send a copy of this form to the Parish Advancement Office – Attn: Amanda Meter**

Email: [ameter@parishepiscopal.org](mailto:ameter@parishepiscopal.org) ● Phone: 972.852.8757