

PARISH

EPISCOPAL SCHOOL

WISDOM ▪ HONOR ▪ SERVICE

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 919-148607-071; 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: 919-148607-071
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 • Phone: 972.852.8757