



## **STOCK TRANSFER INSTRUCTIONS FOR CHARITABLE GIFTS TO DE LA SALLE HIGH SCHOOL**

Please contact your broker with transfer instructions (see below) and then notify De La Salle High School (Karla Wiese at [wiesek@dlshs.org](mailto:wiesek@dlshs.org)) that a transfer will be made. Complete the Letter of Authorization and submit a copy to your broker and to De La Salle High School.

Please instruct your broker to use the following information for transfer purposes. De La Salle High School's account is held with Morgan Stanley.

Account information for DTC transfer:

TO: Morgan Stanley  
NAME: De La Salle High School  
DTC #: 0015  
Account #: 838-010672

Contact at  
Morgan Stanley: Justin Crocker  
(925) 746-2921 (direct)  
(925) 478-5398 (fax)  
[justin.crocker@msgraystone.com](mailto:justin.crocker@msgraystone.com) (email)

For your tax purposes, you will receive an acknowledgement letter via mail once De La Salle High School has received notice of the transfer and sale of the donated securities. We will provide you with the date the shares were received, the high and low of the day, as well as the date the shares were sold and their value when sold.

Should you have any questions, please contact Director of Development, Karla Wiese at (925) 288-8195 or [wiesek@dlshs.org](mailto:wiesek@dlshs.org).

## **THANK YOU FOR YOUR SUPPORT!**

De La Salle High School  
1130 Winton Drive, Concord, CA 94518  
(925) 288-8100 • [www.dlshs.org](http://www.dlshs.org)  
Tax ID# 68-0311262

Date \_\_\_\_\_

LETTER OF AUTHORIZATION

\_\_\_\_\_  
Donor's Brokerage Firm

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip

RE: A Gift of Securities to De La Salle High School

This letters authorizes and directs you to transfer the following securities from my/our account to Morgan Stanley, Inc. for De La Salle High School:

- \_\_\_\_\_ shares of \_\_\_\_\_
- \_\_\_\_\_ shares of \_\_\_\_\_
- \_\_\_\_\_ shares of \_\_\_\_\_
- \_\_\_\_\_ shares of \_\_\_\_\_

FROM: Account Name \_\_\_\_\_  
Account # \_\_\_\_\_

TO: De La Salle High School,  
DTC# 0015  
Account Number 838-010672

Purpose: This gift is designated for:

- The De La Salle Annual Fund (Unrestricted/Greatest Need)
- The Bishop John S. Cummins Scholarship Program
- The Brotherhood Fund
- 50<sup>th</sup> Anniversary Campaign for De La Salle
- Other \_\_\_\_\_

Thank you for your assistance.

Sincerely,

\_\_\_\_\_  
Account Owner

\_\_\_\_\_  
Joint Account Owner

Send a copy to: Karla Wiese, Director of Development De La Salle High School,  
wiesek@dlshs.org (email)