



GIFT OF SECURITIES/STOCK FORM

Stock contributions to Phillips Brooks School may be made by filling out this form or using it as a template to create a letter to be sent to your broker and to the PBS Advancement Office. Please be sure to notify the school about your gift!

Phillips Brooks School

Attn: Advancement Office
2245 Avy Avenue
Menlo Park, CA 94025
650-854-4545 x147
annualgiving@phillipsbrooks.org

Morgan Stanley Smith Barney, L.L.C.

Attn: David Mumford
Senior Vice President, Wealth Management
1001 Page Mill Road, Building 4, Suite 101
Palo Alto, CA 94303
650-496-3900
David.D.Mumford@mssb.com

Date: _____

To (brokerage): _____

Attention: _____

Address: _____

City, State ZIP: _____

RE: GIFT OF SECURITIES

Please accept this letter as authorization to gift (#)_____ shares of the security listed below to **Phillips Brooks School, Account #662-165-687-488, DTC #0015, Tax ID #94-2494458.**

Security to Gift: _____

Designation of Gift: _____

Client Account Title: _____

Client Account Number: _____

Sincerely,

Signature: _____ Print Name: _____

Phone: _____ Email: _____

