

Stock Donation Instructions

If the stock to be donated is held in a brokerage account, give the firm written instructions to “DTC Deliver” the stock to the Claremont Presbyterian Church account at Morgan Stanley.

Example instructions to your brokerage firm:

RE: Account # _____
Stock Donation

Dear Broker:

Please transfer 100 shares of XYZ stock held in my above referenced account to Claremont Presbyterian Church, 1111 N. Mountain Avenue, Claremont, CA 91711. The shares can be DTC delivered to the church’s Morgan Stanley account as follows:

DTC#: 0015
Account # 527-106706-180
Claremont Presbyterian Church

The contact information at Morgan Stanley is as follows:

The Grant Team (Jeff Grant) (800) 830-8727 or (909) 625-9748
Morgan Stanley
456 W. Foothill Blvd.
Claremont, CA 91711

John Doe

Jane Doe