



Phillips Brooks School

Gift of Appreciated Securities 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** by sending a copy of this form to PBS, either in hard copy or by email. This will ensure that your gift is properly acknowledged.

The policy of the PBS Board of Trustees is to sell all gifts of appreciated securities the same day they are received and to document the sale price as the value of the gift received.

Phillips Brooks School

Attention: Advancement Office
2245 Avy Avenue
Menlo Park, CA 94025
650-854-4545 x139
development@phillipsbrooks.org

Morgan Stanley Smith Barney, L.L.C.

Attention: 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 (your 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 Address: _____