



# Convent & Stuart Hall

Schools of the Sacred Heart San Francisco

## Stock Transfer Instructions for Gifts of Securities to Convent & Stuart Hall

**1. Before making the transfer, please notify the school's Advancement Office by email at [giving@sacredsfs.org](mailto:giving@sacredsfs.org).** Because your name will not accompany the electronic transfer of shares, we need the following information in order to issue the proper receipt for your tax-deductible donation and correctly credit your gift:

- a. Your name and contact information
- b. Name of the stock or security
- c. Number of shares
- d. Purpose of donation: Annual Fund, Endowment, Campaign, etc.

**2. Instruct your broker to transfer your securities or stock to the Schools of the Sacred Heart San Francisco brokerage account at:**

Morgan Stanley  
Account Number 528 -115438  
DTC # 0015  
School's Tax I.D. Number 94-1156671  
  
Morgan Stanley Broker: John R. Orofino  
Telephone: (415) 482-2734  
[John.R.Orofino@morganstanley.com](mailto:John.R.Orofino@morganstanley.com)

You will be provided with the mean value of the donation as of the date the shares are received into the school's brokerage account. If you have any questions, please call Ingrid Coolins at 415-345-5823 or email [giving@sacredsfs.org](mailto:giving@sacredsfs.org).

*Thank you for your support of Schools of the Sacred Heart San Francisco.*