



**COMMUNITY SCHOOL**  
*of Naples*

**GIFTS OF SECURITIES**

Thank you for choosing to make your gift to the Community School of Naples via securities. Please print this form and complete the information below. Then, forward the original form to your broker and keep a copy for your files.

**IMPORTANT**—please FAX (or email) a copy of the completed form to BOTH places noted below:

Community School of Naples: Advancement Office  
FAX: (239) 598-2973  
Email: kgreer@communityschoolnaples.org

Morgan Stanley Wealth Management – Attn: Andrew DeVito  
FAX: (239) 449-7850  
Email: Andrew.devito@ms.com

To make the transfer, please instruct your broker to contact:

Morgan Stanley Wealth Management  
8889 Pelican Bay Boulevard North, Suite 300  
Naples, FL 34108  
Phone: (239) 449-7839

Please instruct your broker to include YOUR NAME, as donor, when making the transfer.

Broker's Name: \_\_\_\_\_

Brokerage: \_\_\_\_\_

You are hereby authorized to transfer the following securities:

Name of Company: \_\_\_\_\_ # of Shares \_\_\_\_\_

Now held in the account of (DONOR'S name) \_\_\_\_\_

Account # \_\_\_\_\_

Please transfer the securities as of \_\_\_\_\_ as a gift to the account of:  
(Date)

Community School of Naples  
Tax ID # 59-1920297  
Acct # 525112889-128 (DTC 0015)

I/we do hereby certify that the above transfer constitutes a gift to Community School of Naples and I/we relinquish all further interest in this instrument.

\_\_\_\_\_  
Donor signature and printed name Date

\_\_\_\_\_  
Donor signature and printed name Date

Please note: Once the transfer has been completed, the stock will be sold right away. Morgan Stanley Wealth Management is instructed not to hold the stock. You may be required to file IRS form 8283 for gifts of securities. Please check with your tax advisor.