



**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@sacredsf.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

For internal gift crediting purposes, Convent & Stuart Hall calculates the value of stock gifts based on the mean of the high and the low value per share on the date received into the school's brokerage account. If you have any questions, please call Erin Kjar at 415-345-5803 or email giving@sacredsf.org.

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