



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 document the value using the stock's fair market value, calculated as the average of the highest and lowest trading prices on the day of the sale.

Phillips Brooks School

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

Morgan Stanley Wealth Management

Attention: David D. Mumford
Senior Vice President, Wealth Management
1400 Page Mill Road
Palo Alto, CA 94304
650-496-3966
david.d.mumford@morganstanley.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 #662-165687-496, 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: _____