

Oakwood School

SECURITIES TRANSFER INSTRUCTIONS

If you wish to make a donation through appreciated securities, you will need to provide the following information to your broker.

Please notify the Development Office that a transfer has taken place and give your name, the name of the stock and number of shares being transferred.

Date

Donor's Full Name

Broker's Name

Donor's Street Address

Broker's Firm

Donor's City, State, Zip

Broker's Address

Donor's Preferred Phone Number

Broker's City, State, Zip

Broker's Phone Number

RE: Account # _____

Dear _____:

I hereby authorize the immediate transfer by gift of (indicate number) _____ shares of
(indicate corporation) _____ stock to Oakwood School

Morgan Stanley

Acct #: 164-078920-089

Morgan Stanley DTC #: 0015

Acct # for A/C: Creative Center of Los Altos dba
Oakwood

Contact: Susan Spaugh

Phone: 415.984.6615

Oakwood Development Office:

Melissa Barrow

Director of Development

mbarrow@oakwoodway.org

408.782.7177 x255