



**CHAMINADE**  
COLLEGE PREPARATORY

## Donating Securities

Thank you for your interest in donating securities to Chaminade College Preparatory.

Marketable securities (including mutual funds) may be donated to the school by a transfer directly to an investment account held by Chaminade College Preparatory with Morgan Stanley Smith Barney LLC, or delivered physically with the transferor’s signature or duly executed stock power attached. Marketable securities are assigned a value which is the mean of the high and low prices of the day on which title passes to the school.

Donations of marketable securities which are subject to restriction by securities laws or closely held securities (equity or debt positions in non-publicly traded companies, LLPs, LLCs or other ownership forms) must go through a formal internal review process by Chaminade College Preparatory prior to acceptance.

### **Marketable Securities instructions**

Broker Instructions to deliver securities to our brokerage account:

Deliver To	Morgan Stanley Smith Barney LLC.
DTC	0015
Account Number	812-027207
Account Name	Chaminade College Preparatory
Reference	{Donor Name-Year } or {Anonymous }

For questions contact:

Carina Atoyan

PWM Senior Registered Associate

Morgan Stanley Private Wealth Management

Office: (310) 788-2174 Fax: (310) 772-1305 | Email: Carina.Atoyan@morganstanleypwm.com

**So that we may coordinate acceptance and delivery of your donation, please call Kristine Calara, Vice President for Advancement at (818) 360-0615, or email this completed form to her at kcalara@chaminade.org.**

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Name \_\_\_\_\_

Address \_\_\_\_\_

Email \_\_\_\_\_ Phone Number \_\_\_\_\_

**I wish to donate the following securities to Chaminade College Preparatory:**

See attached list, or

Stock/Security Issuer \_\_\_\_\_

Type of Stock/Security \_\_\_\_\_

Number of shares \_\_\_\_\_

Restrictions on stock/security, if any \_\_\_\_\_

\_\_\_\_\_

**I would like to designate my gift as follows:**

Chaminade's Greatest Need (President's Initiatives)  Other: \_\_\_\_\_

*Thank you for your support of Chaminade College Preparatory.*

Office of Advancement  
Phone: (818) 360-0615