



## STOCK TRANSFER FORM

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### Information for your Broker

To make a broker to broker transfer, your broker will require the following written instructions.

**Foundation Broker: Morgan Stanley**

**Account Manager-Gina Riccardi**

284-286 Bellevue Ave.

Newport, RI 02840

Phone: 401-845-3540 - Fax: 508-251-5849

[gina.riccardi@morganstanley.com](mailto:gina.riccardi@morganstanley.com)

**DTC Participant #: 0015**

**Foundation Account #: 569-014500**

**Foundation Tax ID: 82-5093066**

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### Information for The Catholic Foundation of Southeastern Massachusetts

**Date of Transfer:** \_\_\_\_\_

**Donor Name(s):** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Designation:** \_\_\_\_\_ **Pledge Payment? Y\_\_ N\_\_**

**Name of Stock:** \_\_\_\_\_ **Symbol:** \_\_\_\_\_ **# of Shares:** \_\_\_\_\_

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