



SCEF

San Carlos Education Foundation

Gifts of Stock or Mutual Funds

To transfer securities as a donation to SCEF, please contact the firm where your securities are held and request a transfer of securities. You will need to provide them with the following information:

- Name of stock donation account: **San Carlos Educational Foundation**
- DTC # (routing number for Morgan Stanley where SCEF stock donation account is held) : **015**
- SCEF account # at Morgan Stanley : **118 - 016139**
- Security name and number of shares you wish to donate

It is critical that you also contact Kevin Wolfe at Morgan Stanley and provide him with the following information so that your gift can be tracked:

- Your name as donor
- The name of the security being transferred
- Approximately when the transfer will occur

Kevin Wolfe

Morgan Stanley, Burlingame

(650) 340-6503

or

Kevin.wolfe@ms.com

Lastly, please notify our SCEF Treasurer and provide the same above information so the gift can be recorded appropriately: treasurer@scefkids.org

Thank you for supporting SCEF!!