

SECURITIES TRANSFER INSTRUCTIONS



BERKELEY

PREPARATORY SCHOOL

Thank you for considering a gift of securities to Berkeley Preparatory School. Shares should be delivered to:

Morgan Stanley
DTC #: 0015
Account #: 745-038604
Berkeley Preparatory School Tax I.D.: 59-1292802

To assure proper crediting of the gift, please share the following information with the Office of Institutional Advancement via email, mail or phone:

Name of donor:

Date of transfer:

Issuer:

Number of shares:

Gift designation:

Our policy is to liquidate all stock gifts upon receipt. If you intend to make a gift of low-volume stock, please contact the Office of Institutional Advancement to discuss the gift before the transfer is made.

If any further information is needed, please do not hesitate to call Kristen Ray, Database Manager, Office of Institutional Advancement.

raykri@berkeleyprep.org
(813) 885-1673 ext. 2375
4811 Kelly Road
Tampa, Florida 33615