



Gifts of Stock

A gift of long-term appreciated securities provides a dual tax advantage

- It allows you an income-tax charitable deduction
- It offers significant capital gains tax savings

As with all financial considerations, you are encouraged to discuss potential advantages with your attorney, tax advisor or financial consultant.

Stock Transfer Instructions

Saint Francis High School uses Morgan Stanley to manage our securities.

1. Contact your broker and let them know that you would like to transfer stock to Saint Francis.

Use the following information for the transfer to **Morgan Stanley**:

- *For all gifts **except** the SF EDGE Fund*

Account # **814-023218-058**
DTC: 0015
For the benefit of: St. Francis High School of Mountain View
(Please ask your broker to add your name to the notes)

- *For gifts to SF EDGE Fund **only***

Account # **814-023234-058**
DTC: 0015
For the benefit of: SF Edge Fund

Morgan Stanley LLC: **2725 Sand Hill Rd. Ste. 100**
 Menlo Park, CA 94025

Contact for all transfers: **Betty Luo, 650-234-5569**
 Betty.Luo@morganstanleypwm.com

2. After initiating the transfer with your broker, please email the school and let us know the type of securities being transferred. Advancement@sfhs.com
3. When we receive confirmation that the securities have been transferred to our account, we will send you an acknowledgement letter and tax receipt.

Saint Francis High School, sponsored by the Brothers of Holy Cross, admits students of any race, color and national or ethnic origin. The school does not discriminate based on disability if the student is otherwise qualified and can, with reasonable accommodations, meet the graduation requirements of the school

THANK YOU FOR YOUR SUPPORT

Tax Identification Number 94-1337628

Revised 8/13/18