



## **PROCEDURES FOR DONATING SECURITIES TO THE MEADOWBROOK SCHOOL of WESTON, INC.**

If you wish to make a gift of securities to Meadowbrook, we have arranged with Morgan Stanley to sell the securities for the school. The procedure is as follows:

- If the securities are held in the donor's name, the donor should endorse the certificate(s). The certificate(s) should then be sent to the Meadowbrook or directly to Isabel Lopes at The Wetzel Group, Morgan Stanley, for subsequent sale at the address provided below.
- If the securities are held in the donor's account with a brokerage firm, the donor should direct their broker to transfer the shares to the Morgan Stanley account for deposit into Meadowbrook School's account for sale (FBO: Meadowbrook School of Weston, Inc.).
- In order to facilitate the sale of the securities, the donor should prepare a DTC letter and fax it to Morgan Stanley using the fax number provided below (with a copy to the School) stating that they would like to donate (#) of shares of (company's name) stock to The Meadowbrook School of Weston, Inc., referencing the School's Morgan Stanley account number.

### **MORGAN STANLEY CONTACT INFORMATION**

Isabel C. Lopes, Senior Registered Associate

The Wetzel Group

1 Technology Drive, 3<sup>rd</sup> Floor

Westborough, MA 01581

508-870-7013 (office)

508-870-7050 (fax)

888-827-2901 (toll free)

[Isabel.lopes@morganstanley.com](mailto:Isabel.lopes@morganstanley.com)

DTC Number: 0015

Account Number for Meadowbrook: 521-027658-046

Tax ID Number for Meadowbrook: 04-2104720

If you have any questions, please contact Michele Daly, Chief Advancement Officer at Meadowbrook, cell: 781-589-9180, [mdaly@meadowbrook-ma.org](mailto:mdaly@meadowbrook-ma.org) or Matthew Fishbein, Director of Development at Meadowbrook, 781-314-9228, [mfishbein@meadowbrook-ma.org](mailto:mfishbein@meadowbrook-ma.org).

Meadowbrook's mailing address is 10 Farm Road, Weston, MA 02493-2479