

YWCA IS ON A MISSION

Transfer Instructions for Gifts of Stock

Thank you for your interest in making a gift of stock to benefit YWCA Oahu. Below are the instructions you should give to your broker. Gifts of stock are initiated by the donor's financial institution. Please notify Cara Mazzei, Director of Development and Community Relations YWCA Oahu, so that your gift can be properly tracked and acknowledged.

Instructions to Broker:

Prior to delivery, please provide The Conscious Wealth Management Group at Morgan Stanley with this form BEFORE the transfer:

Donor's Name and Telephone Number	
Name of Stock	
Number of Shares	
CUSIP Number	
Date of Gift with Price (if applicable, otherwise Morgan Stanley will use the date of receipt)	
Broker Name	
DTC Number	
Contact Person and Telephone Number	
Gift Designation if Gift is Restricted	

DELIVER TO: YWCA Oahu
129-080607-310
Morgan Stanley DTC#0015

Please email the form to Lindsay Mist or Cara Mazzei before transferring the stock. It is policy that the stock gift will be sold promptly. YWCA Oahu's Tax ID is 99-0073534. Questions may be directed to YWCA Oahu Development Office at (808) 695.2620.

Contact Information:

The Conscious Wealth Management
Group at Morgan Stanley
Lindsay Mist
Phone: (808) 525.6922
Email: Lindsay.Mist@morganstanley.com
YWCA Oahu

Cara Mazzei
Director of Development & Community
Relations
Phone: (808) 695.2620
Email: cmazzei@ywcaoahu.org

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