**Instructions on How to Make a Gift of Stock or a Wire Transfer to Marlborough School**

**How to Make a Gift of Stock**

Making a gift of stock to Marlborough School is easy to do and can provide significant tax advantages for many donors. In most cases, you will receive an income tax deduction based on the full market value of the stock on the day Marlborough receives it. In addition, you can avoid capital gains taxes that you would pay on the appreciated value of the stock if you were to sell it yourself and make a gift of the proceeds to Marlborough School. You should check with your tax advisor for specific information about tax benefits. Marlborough School’s Stock Policy, as approved by the Board of Trustees, is to sell securities immediately upon receipt.

**Step One—**

**Contact Heather Bullock in Marlborough’s Advancement Office to notify the School of your intent.** Please provide Heather with the stock name, number of shares, and the intended fund(s) to which you wish to contribute. This is an important and necessary step in order for the School to ensure that the transaction will proceed in a timely manner.

Heather Bullock: (323) 964-8414

heather.bullock@marlborough.org

**Step Two—**

Provide your broker with the following information in order to transfer the funds to Marlborough School’s Account at Morgan Stanley:

Morgan Stanley

DTC #: 0015

Further credit a/c: MARLBOROUGH SCHOOL

Further credit acct #: 812-118055

Should your broker have any questions regarding Marlborough’s Account at Morgan Stanley, they may contact Norm Ridley of Morgan Stanley, Inc. at (310) 788-2176.

**How to Make a Wire Transfer for your Gift**

Please contact Heather Bullock at (323) 964-8414 to receive instructions on how to make a wire transfer for your gift.

Thank you once again for your support of Marlborough School. We greatly appreciate it!