



# Gift of Stock / Appreciated Securities

## Stock Transfer

The simple way to gift appreciated securities from your brokerage to the Epilepsy Foundation of Minnesota.

Today's Date: \_\_\_\_\_

To: \_\_\_\_\_  
Print name of brokerage first where your stock is held.

RE: Gift of stocked held in my account, # \_\_\_\_\_

This is authority for you to "DTC" deliver \_\_\_\_\_ shares

Of \_\_\_\_\_ stock from my account to:

**The Northern Lights Group Morgan Stanley**  
**225 South Sixth Street Suite 5100 | Minneapolis, MN 55402**  
Stacy Eng Investment Advisor | Direct Phone: 612.349.4847 | Email: stacy.a.eng@ms.com

**FOR CREDIT TO ACCOUNT #: 364-091390-098      IN THE NAME OF: Epilepsy Foundation of MN**

**The Northern Lights Group Epilepsy Foundation of MN DTC Number: 0015**

Signed

X \_\_\_\_\_

X \_\_\_\_\_

Signed by donor (person(s) named on your account).

### Donor should consider the following when making this gift:

- Notify the Epilepsy Foundation of Minnesota 651.287.2319 that you are making this transfer.
- Select appreciated securities held no longer than one year.
- Ask your broker to deliver shares with your lowest cost basis.
- Adjust your records to reflect the delivery of those specific shares.
- Fill out, sign, and give this form to your broker prior to transfer day.
- Select the day you wish to make each transfer and call your broker early to request s/he make the transfer before the market closes.