



MIDDLESEX SCHOOL
Alumni & Development Office

Thank you for your inquiry about making a gift of appreciated securities. The following information will help you and/or your broker process this transaction. Thank you in advance for your generous support of Middlesex.

Middlesex School's Broker: Morgan Stanley
125 High Street
Boston, MA 02110

Agent: Terri R. Eisnor
Phone: (617) 946-5115
DTC#: #0015
A/C: Middlesex School
A/N 863-207543-355

In order for Middlesex and our broker to process your gift and send you the appropriate tax receipt, please call or email the Middlesex School Development Office and provide the following information:

Name of the donor: _____

Date of the gift: _____

Name of the stock to be transferred: _____

Number of shares and/or approximate gift value: _____

Gift designation: Annual Fund _____ Capital Gift _____

This is a Pledge Payment _____

If you would like additional information, or need further assistance, please do not hesitate to contact our office.

Thank you.