



## Westchester Parks Foundation – Securities Transfer Request

### Section I. This is a request to (please select one)

- I wish to donate shares of stock to Westchester Parks Foundation (WPF). Shares can be transferred directly from your brokerage account to WPF's account. Please complete the form below in its entirety and send a copy or fax to your broker to initiate the transfer. **A copy or fax of the form must be sent to Westchester Parks Foundation's office at 914-455-0367. Please see our mailing address below.**
- I wish to donate mutual funds or other types of financial instruments to Westchester Parks Foundation. Please contact or ask your broker to contact Westchester Parks Foundation's office at 914-231-4600 for further information. Mutual Funds must be sold prior to delivery.

### Section II. Personal Information

Name \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

### Section III: Gift Information PLEASE BE SURE TO CONTACT YOUR BROKER TO INITIATE THE TRANSFER

Your Broker's Name \_\_\_\_\_ Broker's Telephone Number \_\_\_\_\_

Number of Shares \_\_\_\_\_ Security Name \_\_\_\_\_

Ticker Symbol (if known) \_\_\_\_\_ Gift Designation \_\_\_\_\_

Please accept this security transfer request as your authorization to transfer from \_\_\_\_\_  
account to Westchester Parks Foundation's account as instructed on page 2:

Customer Name: Westchester Parks Foundation Tax ID: 13-2937499

Account Number: \_\_\_\_\_

WPF Contact: Erin Cordiner, Director of Philanthropy & Community Engagement, 914-231-4600  
Westchester Parks Foundation  
104 Smith Avenue  
Mount Kisco, NY 10549  
Erin@theWPF.org

**Westchester Parks Foundation Inc**  
**STOCK TRANSFER INSTRUCTIONS**

**CONTACT**

Christian A. Templeman, CRPC®, CRPS®  
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Morgan Stanley Wealth Management  
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**STOCK TRANSFER INSTRUCTIONS**

**All DTC Eligible Securities:**

DTC Clearing #:	0015
Clearing Agent:	Morgan Stanley Smith Barney LLC
FBO:	Westchester Parks Foundation Inc
Account Number:	409086888
Tax ID #:	132937499

**All physical Delivery of Securities:**

Morgan Stanley Wealth Management  
1 Fawcett Place  
Greenwich, CT 06830

For further credit to: Westchester Parks Foundation Inc

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Signature(s) of account owner(s) \_\_\_\_\_

Please be sure that Westchester Parks Foundation is notified of the details of your stock gift to ensure proper acknowledgment of your gift. **Please fax a copy of this transfer request form to us at 914-455-0367 or a copy can be mailed to 104 Smith Avenue, Mount Kisco, NY 10549.** Thank you!