



Stock Transfer Instructions

Please reach out to Diana Pupillo, Development Director, at diana@gatewaypets.org or 618-687-8007 x715 with any questions.

Provide the information below to your broker and if possible, authorize your broker to release your name to Morgan Stanley as the donor of the stock.

Depository Trust Company (DTC)

- DTC Clearing Number: 0015
- Account Number: 033038964
- Account Name: Gateway Pet Guardians
- Receiving Firm: Morgan Stanley, The Benyo Team at Morgan Stanley
7733 Forsyth Blvd, Ste 2100, Clayton, MO 63105

If you or your broker have any **questions for the receiving firm**, please contact Henry Horrell, Financial Advisor, at henry.horrell@morganstanley.com or 314-889-8102.

To ensure Gateway is able to properly acknowledge your gift, provide following information via email to: diana@gatewaypets.org.

- Donor's Name and Address
- Purpose of gift, any restrictions
- Name, location, and telephone number of broker/agent sending stock
- Name and symbol of stock to be transferred*
- Number of shares to be transferred
- Anticipated date of transfer

PLEASE NOTE:

We recommend that you consult with your financial or tax advisor before making any financial decisions.

To claim the tax benefits of donating stock to Gateway Pet Guardians, report the stock donation when you file your tax return. Please be aware that the date of transfer is not necessarily the date on which you gave your broker instructions. It is the date on which the stock enters into the Gateway Pet Guardians' account.

Year-end gifts: Be sure to allow extra time for the transfer from your broker's account to Gateway Pet Guardians' Morgan Stanley account, and emphasize to your broker the importance of completing the transfer by December 31. When the 31st falls on a weekend, the transfer should be completed by the preceding Friday.

**For gifts of Mutual Funds, please consult with our brokers at Morgan Stanley to ensure that the Mutual Fund can be transferred.*