

# LETTER OF INSTRUCTION

DONOR: To ensure proper and timely credit, after you forward this form to your financial institution, please also send a copy of this document to:

The Veterans Memorial & Support Foundation of Los Gatos  
P.O. Box 1696  
Los Gatos, CA 95031  
[honorAvet@gmail.com](mailto:honorAvet@gmail.com)

*From Client/Donor:*

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone & Fax: \_\_\_\_\_

*To Broker:*

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone & Fax: \_\_\_\_\_

*I intend to make a charitable gift to The Veterans Memorial & Support Foundation of Los Gatos.  
Please consider this to be my letter of instruction to you to transfer:*

\_\_\_\_\_ shares of:  \$ \_\_\_\_\_ worth of:

\_\_\_\_\_  
(Name of Stock/Mutual Fund)

\_\_\_\_\_  
(Ticker Symbol)

From account: \_\_\_\_\_

In the name of: \_\_\_\_\_

For arrival (date): \_\_\_\_\_

To Receiving Firm: Morgan Stanley  
For Credit To: Veterans Memorial & Support Foundation of Los Gatos  
Account: 167-020 XXX

Veterans Foundation Contact: Morgan Stanley Contact: Robert Chaykin  
408-358-0994  
[robert.chaykin@morganstanley.com](mailto:robert.chaykin@morganstanley.com)

*Note: Transfer of paper stock certificates (not recommended) requires a Stock/Bond Power Assignment Form..*

Please designate this gift for the benefit of: The Liberty Capital Campaign

Authorization: \_\_\_\_\_ /\_\_\_\_\_/\_\_\_\_\_  
(Signature) (Date)

Name: \_\_\_\_\_  
(Please Print)

