VETERANS MEMORIAL & SUPPORT FOUNDATION

# Letter of Instruction

*Charitable Gift of Securities*

**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** · 481 North Santa Cruz, Ste. 250, Los Gatos, CA 95030
Email: accounting@honoravet.org

## 1 FROM CLIENT / DONOR

Name _____

Address _____

Phone _____ Fax _____

## 2 TO BROKER (YOUR CURRENT FINANCIAL INSTITUTION)

Name _____

Address _____

Phone _____ Fax _____

## 3 TRANSFER INSTRUCTIONS

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

☐ _____ shares of **OR** ☐ **$** _____ worth of

_____ _____
*Name of Stock / Mutual Fund* *Ticker Symbol*

From account _____ In the name of _____

For arrival (date) _____

## 4 RECEIVING FIRM — PRE-FILLED BY THE FOUNDATION

| | |
|---|---|
| Receiving Firm | **Morgan Stanley** |
| For Credit To | **Veterans Memorial & Support Foundation** |
| Account Number | **167-020-XXX** |
| Foundation Representative | **Mr. Dedrick Rhone**, Morgan Stanley<br>16000 Los Gatos Blvd, Los Gatos, CA 95032<br>408-947-3707 (Direct) \| 408-358-0988 (Main) \| dedrick.rhone@morganstanley.com |

***Note:*** *Transfer of paper stock certificates (not recommended) requires a Stock/Bond Power Assignment Form. Should you have paper certificates to donate, please contact Morgan Stanley directly.*

## 5 GIFT DESIGNATION & AUTHORIZATION

Please designate this gift for the benefit of: **The Veterans Memorial & Support Foundation General Fund**

_____ _____ / /
*Authorized Signature* *Printed Name* *Date*

*Thank you for honoring those who served.*

Revised 2026.10.15