



Stock Transfer Instructions

To transfer ownership of stock to The Overlake School from a Morgan Stanley account, please contact your Morgan Stanley Financial Advisor directly. For StockPlan accounts, call the StockPlan team directly at 1-877-380-7793. Internal Transfer requests cannot be completed online.

Please authorize your broker to transfer ownership of stock to The Overlake School's account below:

Receiving Brokerage Firm: Morgan Stanley

Receiving Account Title/Registration: The Overlake School

Receiving Account Number: 135-020454

DTC Number: 0015

MEMO: Include Donor Name and Gift Purpose

Contact at Morgan Stanley: Chelsea Brogan at Chelsea.Brogan@MorganStanley.com

Questions? Please contact Brisen Brady, Director of Development at The Overlake School, at bbrady@overlake.org or 425-868-1000. If possible, please notify Brisen of your transaction in advance, and the name of company stock being transferred so we can attribute the stock correctly.