

MIDDLESEX SCHOOL
Alumni & Development Office

Thank you for your inquiry about making a gift of appreciated securities. The following information will help you and/or your broker process this transaction. Thank you in advance for your generous support of Middlesex.

Middlesex School's Broker: Morgan Stanley
125 High Street
Boston, MA 02110

Agent: JoAnne M. Ludwig

Phone: (617) 946-5115

DTC#: #0015

A/C: Middlesex School

A/N 486-207543-355

To help Middlesex and our broker process your gift and send you the appropriate tax receipt, please contact the Middlesex School Development Office directly via postal service, telephone, or fax and provide the following information:

Name of the donor: _____

Date of the gift: _____

Name of the stock to be transferred:

Number of shares and/or approximate gift value:

Gift designation (Annual Fund, Capital Gift):

If you would like additional information, or need further assistance, please do not hesitate to contact our office.

Thank you.