

# PHILADELPHIA FOUNDATION

## Stock Donation Instructions

PHILADELPHIA FOUNDATION  
1835 Market Street, Suite 2410  
Philadelphia, PA 19103  
215 563 6417  
Fax: 215 563 6882

### COMMENTS:

Please fill out and send this letter to the listed individuals to initiate the transfer of your securities to the Philadelphia Foundation:

1. Your broker to initiate the transfer of your securities to Philadelphia Foundation
2. Philadelphia Foundation, attn: Siobhan Neitzel fax# 215-563-6882.  
(Email: [snietzel@philafound.org](mailto:snietzel@philafound.org).)
3. Philadelphia Foundation's financial advisor, Bruce Fryer at Morgan Stanley, attn. Carol Kwietnieski, fax# 610-706-5005. (Email: [Carol.Kwietnieski@morganstanley.com](mailto:Carol.Kwietnieski@morganstanley.com))
4. Your Donor Services Representative: via their direct email or [donorrelations@philafound.org](mailto:donorrelations@philafound.org)

These steps will enable the Philadelphia Foundation to follow the transfer and credit your gift accurately and promptly.

**Failure to provide a copy of the letter to your broker, Philadelphia Foundation AND to Morgan Stanley could cause unnecessary delays in processing your gift.**

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**Please note that these instructions ARE NOT to be used for mutual fund transfers.** If you would like to transfer shares of a mutual fund or have any questions, please contact Carol Kwietnieski at Morgan Stanley via [Carol.Kwietnieski@morganstanley.com](mailto:Carol.Kwietnieski@morganstanley.com).

Your broker's name  
Your broker's address  
Your Account #:

RE: Contribution of \_\_\_\_\_ Shares of \_\_\_\_\_

Dear \_\_\_\_\_:

I have decided to contribute \_\_\_\_\_ (number) shares of \_\_\_\_\_ (name of stock) \_\_\_\_\_ (stock symbol) to Philadelphia Foundation for further credit to the \_\_\_\_\_ Fund (name of Philadelphia Foundation fund). Please deliver these shares to the broker for Philadelphia Foundation as follows:

**Morgan Stanley**  
**One Tower Bridge**  
**100 Front Street—Suite 600**  
**W. Conshohocken, PA 19428**  
**DTC # 0015**

**Philadelphia Foundation**  
**Account #665-048697-107**

Attention: Carol Kwietnieski 610-260-8640 (phone) or Toll Free: 800-347-4305  
610-706-5005 (fax)

The Federal I.D. number for Philadelphia Foundation Inc. is 23-1581832. If you have any questions, please either contact your donor services representative at their direct email address or at [donorrelations@philafound.org](mailto:donorrelations@philafound.org) or Siobhan Neitzel (215-863-8113 or [sneitzel@philafound.org](mailto:sneitzel@philafound.org)).

**Failure to provide a copy of the letter to your broker, Philadelphia Foundation AND to Morgan Stanley could cause unnecessary delays in processing your gift.**

Thank you for your help.

Sincerely,

\_\_\_\_\_  
Your name

cc: Siobhan Neitzel – FAX 215-563-6882  
cc: Carol Kwietnieski – FAX 610-706-5005