



### Gifts of Security Transfer Instructions

Thank you for your interest in making a charitable gift in the form of a Security Transfer. Please note that **you must initiate all securities donations with your broker and please consult your broker to ensure that the stock is eligible for electronic delivery over the Deposit Trust Company (DTC) system (this is the fastest, most secure and cost effective method of donating securities).**

Acknowledgment will be made in compliance with IRS regulation. Please consult with your tax advisor before making a charitable donation to any charity.

Please complete (or request that your broker complete) the information below to help ensure that your gift is processed accurately. Once you've made a transfer, please contact Joel Karabach at [joel.karabach@livestrong.org](mailto:joel.karabach@livestrong.org), 2201 East 6th Street, Austin, TX 78702, telephone 512.279.8371.

**DONATION is made to:**  
(check one)

**The LIVESTRONG Foundation (TID #74-2806618)**  
Your gift will specifically support programs and operations conducted by The LIVESTRONG Foundation.

**The LIVESTRONG Foundation Endowment (TID #74-2806618)**  
The earnings from your gift will provide long-term support for the programs operated by The LIVESTRONG Foundation.

**DONOR & SECURITIES Information:**

\_\_\_\_\_  
Name & Type of Securities (e.g.: DELL common stock)      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Security Symbol      Number of Shares      Transfer Date

\_\_\_\_\_  
Donor Name (Individual, Corporation, Foundation)      \_\_\_\_\_  
Broker Name

\_\_\_\_\_  
Donor Street Address      \_\_\_\_\_  
Broker Company / City / State

\_\_\_\_\_  
Donor City / State / Zip      \_\_\_\_\_  
Broker Contact / Telephone Number

\_\_\_\_\_  
Donor Telephone / Email address (to be used only if a question arises in the donation process)

***If this gift is being made in support of a Team LIVESTRONG Challenge participant, indicate the following:***

\_\_\_\_\_

**Specific Processing Procedures**

**Receiving Firm Name and Address:** Morgan Stanley  
Attn: Daniel Sullivan or James D. Stoker, II, CIMA  
301 Congress Ave, Suite 1400  
Austin, TX 78701  
512.370.0448  
[daniel.sullivan@morganstanley.com](mailto:daniel.sullivan@morganstanley.com)  
[james.stoker@msggraystone.com](mailto:james.stoker@msggraystone.com)

**DTC Eligible Securities:** Deliver to DTC Clearing Number 0015  
(check one) Credit to:  The LIVESTRONG Foundation  
Account number 042-111288  
  
 The LIVESTRONG Foundation Endowment  
Account number 042-110965

**Please reference: "DONOR NAME" to ensure your donation is properly credited.**

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Donor Signature Date Signed Donor Signature Date Signed  
NOTE - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

**For Gifts of Stock not held in a brokerage account or for gifts of Restricted Stock, please contact Morgan Stanley as follows:**

Morgan Stanley  
Attn: Daniel Sullivan or James D. Stoker, II, CIMA  
301 Congress Ave, Suite 1400  
Austin, TX 78701  
512.370.0448  
[daniel.sullivan@morganstanley.com](mailto:daniel.sullivan@morganstanley.com)  
[james.stoker@msggraystone.com](mailto:james.stoker@msggraystone.com)