



## DTC TRANSFER INSTRUCTION SHEET INSTRUCTIONS FOR GIFTS OF STOCK OR MUTUAL FUNDS

Thank you for supporting Wellspring Living! Donating stock or other securities takes just three easy steps and will impact many lives. Please keep in mind that your gift of stock and/or mutual funds must be received by Wellspring Living's broker by December 31, 2023 to be eligible as a tax deduction for 2023.

### IMPORTANT INFORMATION:

- 1) Complete this form
- 2) Send a copy of this form to your financial advisor
- 3) Send a copy of this form to Wellspring Living by email to [finance@wellspringliving.org](mailto:finance@wellspringliving.org) and [data@wellspringliving.org](mailto:data@wellspringliving.org)

### PLEASE COMPLETE THE FOLLOWING INFORMATION:

\_\_\_\_\_  
To (your financial advisor)

\_\_\_\_\_  
Telephone and/or Email

Please use this form as authorization to transfer the securities listed below from my account to Morgan Stanley as my gift to Wellspring Living, Inc.

\_\_\_\_\_  
From (your name or donor name)

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Name of stock or mutual fund

\_\_\_\_\_  
Number of Shares

\_\_\_\_\_  
Date of Gift

\_\_\_\_\_  
Estimated Value of Gift

\_\_\_\_\_  
Who, in addition to the legal donor, should receive recognition for this gift (if applicable)?

\_\_\_\_\_  
Signature

**DTC TRANSFER INFORMATION FOR  
FINANCIAL ADVISORS**

For gifts of securities to Wellspring Living,  
please deliver by DTC to:

**Morgan Stanley**

**DTC# 0015**

**FBO: Wellspring Living, Inc.**

**Account Number: 769-144781**

**Wellspring Living Tax ID: 58-2614182**