



## **Making a Gift of Stock or Securities to Lund**

Thank you for considering a gift to support Lund's programs and services. This information is intended to assist you with the process of gifting stock or securities. If you have additional questions please call 802-864-7467 (Lund's main line) and ask to speak with a member of the Development staff team.

If you are interested in making a gift of stock or securities:

1. Please contact Lund's Development Department by phone at (802) 864-7467 or by email at [development@lundvt.org](mailto:development@lundvt.org). Please share the details of the gift is being made, who the gift is from, and the type of stock or securities being given.
2. Please reach out to Morgan Stanley or request that your financial advisor do so on your behalf. Please contact: Lucinda Bain at (800) 446-0193 or [lucinda.bain@morganstanley.com](mailto:lucinda.bain@morganstanley.com). Please let Lucinda know that a gift is being made, who it is from, and the type of stock or securities.
3. Please share the following information with your financial advisor or your financial institution initiating the transaction:
  - Morgan Stanley
  - DTC: 0015
  - FOR FURTHER CREDIT TO: Lund Family Center Account: 383-035261-210
4. Lund will recognize your gift with an acknowledgment letter that also serves as a tax receipt.

**Because of Lund, children have hope, people have opportunities, and families in Vermont are stronger.  
Thank you for supporting Lund!**