



Thank you for your interest in donating appreciated securities to Palo Alto Partners in Education!

In order to make a donation of this type, you have to complete the following steps:

1. Write a letter to your brokerage service asking that the securities be transferred to our brokerage account. Please see the next page for an example of that letter.

Note: If you are trying to transfer shares of a mutual fund, please contact Greg Gaon at gregory.d.gaon@morganstanley.com or (650) 496-3968 to transfer, as these require special handling.

2. Email PiE at donations@papie.org with: the date, the number of shares, and the symbol of your security. Sometimes information about who made the donation is disconnected from the actual transfer, so if you let us know you are requesting a transfer we can be looking for it.

When the transfer is complete, PiE immediately sells the security and records the gift after the transaction clears, sometimes 10 or more days after your donation. As soon as we have recorded the gift, you will receive a tax receipt indicating the average price on the day of the transfer to be used for tax purposes.

By giving to PiE, you join with the thousands of other PAUSD families who together provide funding to transform our schools for our kids. Your contribution will help preserve a truly outstanding public education in the Palo Alto Unified School District.

<This is an example of a letter to your broker>

<Your Broker Name and Address>

RE: Your Account # _____

Dear _____

This letter is your authorization to immediately transfer by DTC from the above referenced account the following:

_____ shares of _____ (ticker: _____)

To: Morgan Stanley account # 662-187301-842
Morgan Stanley DTC # 0015
Morgan Stanley account name: Palo Alto Partners In Education
Morgan Stanley contact: Gregory Gaon
gregory.d.gaon@morganstanley.com
Senior Vice President
(650) 496-3968 Direct
1400 Page Mill Road
Palo Alto, CA. 94304

This transfer is being made as a charitable gift to registered 501(c)(3) Palo Alto Partners in Education, tax ID 77-0186364. Please contact me at () _____ to confirm receipt of this request.

Please ensure that you also send my name with the transfer, so that Partners in Education can properly issue a tax receipt for the gift of securities.

Please also let PiE know that I ____ do or ____ do not want my gift to be anonymous.

Thank you for your assistance.

Sincerely,

Date:

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