



## TRANSFER INSTRUCTIONS FOR GIFTS OF STOCK

Please inform your stockbroker that shares can automatically be transferred to:

DTC #0015, Morgan Stanley Smith Barney LLC  
For: Montessori of Maui, Inc DBA Montessori School of Maui  
Account: #134-110994-032

### PLEASE COMPLETE THIS FORM AND EMAIL, FAX OR MAIL TO:

Doug Karatsu, Financial Advisor  
Morgan Stanley Smith Barney LLC  
33 Lono Avenue Suite 330  
Kahului, HI 96732  
[Doug.Karatsu@morganstanley.com](mailto:Doug.Karatsu@morganstanley.com)  
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Cheryl Kaupalolo, Business Manager  
Montessori School of Maui  
2933 Baldwin Avenue  
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[cherylk@momi.org](mailto:cherylk@momi.org)  
Fax: 808-573-0389  
Phone: 808-573-1230

Donor's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Address: \_\_\_\_\_

Name of Stock: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

Value per Share: \_\_\_\_\_ Date of Transfer: \_\_\_\_\_

Funds to be used for:  Annual Fund  Endowment  Restricted Gift \_\_\_\_\_

Your Stockbroker's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Company Name \_\_\_\_\_ DTC Number: \_\_\_\_\_

All contributions to Montessori School of Maui, a nonprofit, 501(c)3 organization,  
are tax deductible to the fullest extent allowed by law.

*Thank you for supporting the programs of Montessori School of Maui!*

*g r o w i n g   g l o b a l   c i t i z e n s   s i n c e   1 9 7 8*