

# Gulf of Maine Research Institute

## Gift Stock Transfer Instructions

Thank you for supporting the Gulf of Maine Research Institute. **Morgan Stanley Wealth Management** is our custodian for transfers of securities. The information provided below will ensure that your stock transfer is handled efficiently. Please contact us if you have any questions.

For proper routing of your transfer to the GMRI account at Morgan Stanley Wealth Management, please use the following information:

- Morgan Stanley Wealth Management DTC #0015
- Gulf of Maine Research Institute Account #606-126-823
- Contact:
  - Jeremiah S. Burns, Jr. at (207) 871-7373
  - Laura Saccomanno at [laura.sacomanno@morganstanley.com](mailto:laura.sacomanno@morganstanley.com)

To ensure that your gift is processed and recorded accurately, we would appreciate you or your broker providing the following information to Morgan Stanley Wealth Management *and* to GMRI at the time of your transfer.

- Name of donor (or indicate that gift is anonymous)
- Contact name and information for delivering institution (your brokerage firm, bank, etc.)
- DTC Number (Your financial institution's unique account number assigned by the Depository Trust Company)
- Name of stock(s) and number of shares to be transferred
- CUSIP number (9-digit ID number for each stock)

If you have any questions about your stock transfer or the above information, please feel free to contact our offices:

Maggie Roudsari  
Chief Development Officer  
(207) 228-1629  
[mroudsari@gmri.org](mailto:mroudsari@gmri.org)

or

Brian Hallisey  
Development Gift Administrator  
(207) 228-1638  
[bhallisey@gmri.org](mailto:bhallisey@gmri.org)

Once the stock has been transferred, we will be notified of all relevant information about your contribution: the date of transfer, the high, low, and mean value of stock on the transfer date, and the total value of the stock transferred. For tax purposes, your gift will be credited at the mean value of the stock on the date of transfer.