



The **Children's Inn** at NIH

**Fund Transfers and Domestic Security Settlement Instructions for Gifts of Securities**

**Please complete the form below and send to:**

Donald Rodrick  
CFO  
The Children's Inn at NIH  
7 West Drive  
Bethesda, MD 20814-1509

Phone: 301.451.9456

Donald.Rodrick@nih.gov

\*\*\*\*\*

**Gift Information:**

**Name:** \_\_\_\_\_

**Expected Date of Transfer:** \_\_\_\_\_

**Name of Security:** \_\_\_\_\_ **# of Shares:** \_\_\_\_\_

**CUSIP and Ticker Symbol:** \_\_\_\_\_

**Delivering Bank or Broker Name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Delivering Bank or Broker DTC#:** \_\_\_\_\_

\*\*\*\*\*

**For Electronic Transfers:**

Please ask your broker to **transfer the shares of securities to The Children's Inn at NIH's account** at Morgan Stanley. Shares must be transferred, not sold. Please ask your broker to call Graystone Consulting (a business of Morgan Stanley) prior to making the transfer. Upon receipt of the shares, Graystone (Morgan Stanley) will notify The Children's Inn (TCI) of the mean value of the shares on the date of transfer (see Gift Valuation on page 2). The Children's Inn will then send a written acknowledgement to the donor.

**Contact:**

**Graystone Consulting**  
**12505 Park Potomac Avenue, Suite 420**  
**Potomac, MD 20854**  
**Phone: (866) 288-9632**  
**Fax: (301) 279-6444**  
**Direct Phone: (301) 279-6400**

**Book Entry Securities:**      **All DTC Eligible Securities**  
**Morgan Stanley**  
**DTC Participant Account No. 0015**  
**Account #: 959-113980-951**  
**Reference: The Children's Inn at NIH**

**For wire transfers or mutual fund transfers:** please contact Graystone Consulting office above for instructions.

**Other Information:**

**The Children's Inn Federal Tax I.D.:**      **#52-1638207**

**For stock certificates:**

If you have physical possession of the stock certificates, please contact Donald Rodrick or Graystone for further information, instructions, and forms.

**Gift Valuation:**

The contribution date is an important factor in determining the value of the gift, and therefore the amount of the donor's charitable deduction. The contribution date is the date that the donor irrevocably relinquished possession of the securities. For example:

- the date the shares are received electronically into TCI's account at Morgan Stanley; or
- the date of the post mark if stock powers and certificates are mailed; or
- the date the stock certificates are hand-delivered to TCI.

**For securities that are listed on a stock exchange, the average of the high and low price per share (not the "closing" price per share) on the date of transfer is used to calculate the mean value and the amount of the gift.**