



**Southeastern**  
Baptist Theological Seminary

# Transfer Instructions for Donation of Stock or Other Securities

## ACCOUNT INFO

Morgan Stanley Wealth Management  
DTC Number: 0015  
Account: 801-112579-006

## FOR THE BENEFIT OF

Southeastern Baptist Theological Seminary Inc

## ADDRESS

Morgan Stanley Wealth Management  
Jay Westmoreland, CFP®  
PO Box 11429  
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Charlotte, NC 28220

## CONTACT INFO

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### GEORGE HARVEY

DIRECTOR OF PLANNED GIVING

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## Instructions for Stock Gifts

1. Before donating securities, please consult with your CPA, tax attorney, or financial advisor for their recommendations.

2. Before making your donation, your broker needs to provide the following information to Jay Westmoreland or Nicole Blumenthal at Morgan Stanley Wealth Management:

- Name of owner/securities
- Address
- Stock/securities to be donated
- Designated fund (Purpose)  
(If not specified, gift will be to the Southeastern Fund)

3. Notify Jay Westmoreland, Nicole Blumenthal, and George Harvey.

*[Click Here to Notify](#)*

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