



## Asset Transfer Form

To transfer assets to the Central New York Lyme and Tick-Borne Disease Alliance ("Alliance"), please provide your broker with this completed form. Also, please forward a copy of this form to the Alliance so that we may credit your gift appropriately. Note the date of your gift will be the date the asset is titled in the Alliance's name or is transferred to our account. You can reach us by email at [info@cnylymealliance.org](mailto:info@cnylymealliance.org) or by phone at (315) 551-2551. Thank you for your gift.

**BROKER NAME:** \_\_\_\_\_

**BROKER'S FIRM NAME:** \_\_\_\_\_

**BROKER'S ADDRESS:** \_\_\_\_\_

**RE: YOUR ACCOUNT NUMBER:** \_\_\_\_\_

**YOUR NAME:** \_\_\_\_\_

**SUBJECT: GIFT TRANSFER of ASSETS**

Dear Broker:

Accept this letter as a request and authorization to execute the following gift transfer of assets from the above referenced account. Please deliver these to the broker for the Central New York Lyme and Tick-Borne Disease Alliance as follows:

DTC #0015  
Morgan Stanley Wealth Management  
Account # 621-054-515  
Central New York Lyme and Tick-Borne Disease Alliance  
Attn: Renée Grevelding (315)464-3319 or [Renee.grevelding@morganstanley.com](mailto:Renee.grevelding@morganstanley.com)

**ASSET DESCRIPTION:** \_\_\_\_\_

**NUMBER OF SHARES:** \_\_\_\_\_

**DATE OF TRANSFER:** \_\_\_\_\_

Please contact Eric M. Brown, CFP of Morgan Stanley Wealth Management at 315-464-3388 with information on assets being transferred.

**DONOR NAME (for acknowledgement and recognition)** \_\_\_\_\_

Sincerely,

**SIGNATURE:** \_\_\_\_\_