



## Financial Security Donation Instructions

All gifts to 9Marks are *tax-deductible*. We accept charitable contributions of financial securities through our account with Morgan Stanley.

To initiate a transfer of securities, please provide the following information to your investment management firm:

**DTC #** 0015  
**Account #** 642-067244  
**Name:** 9Marks

Upon initiation of the transfer, please notify Drew Allenspach at [drew@9marks.org](mailto:drew@9marks.org) with the details of your donation.

Upon completion of the transfer, 9Marks will send you an acknowledgment of the transaction. 9Marks will also issue you a giving statement in January to claim your tax deduction.

### Contact Information for Assistance

Morgan Stanley  
Charles Boylan  
Morgan Stanley Wealth Management  
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9Marks Development  
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Thank you for your generosity to 9Marks.