



Instructions for Donating Stock or Mutual Funds to Asian Counseling and Referral Service (ACRS)

Thank you for choosing to support **Asian Counseling and Referral Service**. Donating public stock or mutual funds is a highly tax-efficient way to advance our mission and maximize your impact. Our investment accounts are managed by **The Pacific Wealth Management Group at Morgan Stanley**. To ensure your gift is processed smoothly and credited to you correctly, please share the following instructions with your financial advisor or brokerage firm.

Section 1: Our Brokerage Account Details

Please request that your broker transfer the shares electronically via the **Depository Trust Company (DTC)** network using the information below:

- **Brokerage Firm:** Morgan Stanley Smith Barney LLC
- **DTC Number:** 0015
- **Account Name:** Asian Counseling and Referral Service
- **Account Number:** 144-078138
- **Broker Memo Note:** FBO Asian Counseling and Referral Service | Attn: The Pacific Wealth Management Group

Section 2: Important Note to Donors (Pre-Notification Request)

Electronic stock transfers often arrive in our brokerage account as "anonymous" gifts. The financial institutions do not automatically include your name or contact information with the transfer. To ensure we can identify your gift and issue your tax-compliant acknowledgment letter, **please notify us of your intent to donate** by emailing the details below before or at the time of the transfer.

Gift Notification Details

- **Donor Name(s):**
- **Mailing Address:**
- **Email & Phone:**
- **Name of Stock/Ticker Symbol:**
- **Number of Shares:**
- **Expected Date of Transfer:**
- **Designation (Optional):** ☐ General / Greatest Need ☐ Specific Program: (Program Name)

Section 3: Contact Us

If you or your financial broker have any questions regarding this transfer, please reach out to our team directly:

- **ACRS Contact:** Jenni Rebecca Stephenson, Director of Development | 206.506.4987 | jennis@acrs.org
- **Firm contact:** Karlie LeClair, Financial Advisor | 206.628.4881 | Karlie.LeClair@morganstanley.com



ASIAN COUNSELING and REFERRAL SERVICE

3639 Martin Luther King Jr. Way S
Seattle, WA 98144

P 206 695 7600
F 206 695 7606

WA Relay 800 833 6384
www.acrs.org

