



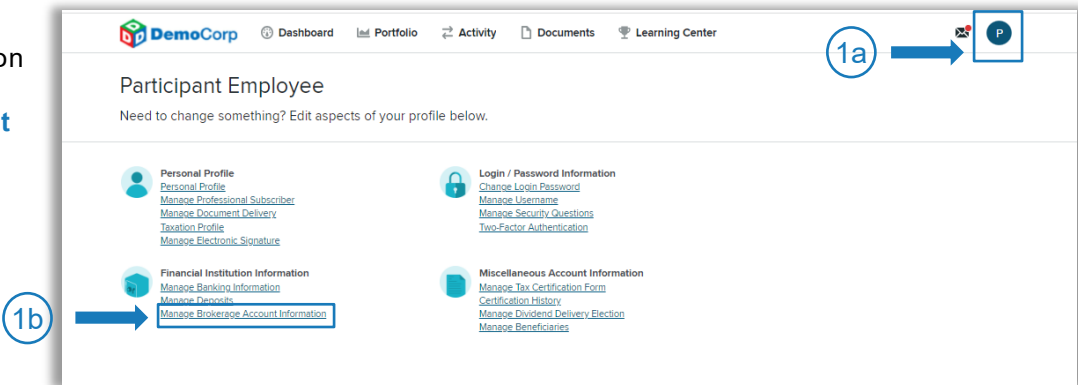
# How to Transfer Shares

For U.S. and Non-U.S. Participants

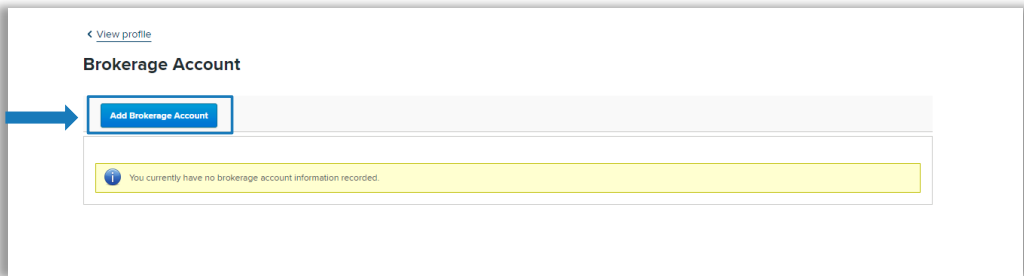
Depositing shares to a personal brokerage account provides you the capability to transfer assets from your stock plan account to other financial institutions without having to sell the shares. This gives you the flexibility to decide what to do with your shares now or at a later date. This guide will walk you through the steps of transferring your stock plan shares to a brokerage account.

1. Add Brokerage Account

Once you've logged in, click on "View Profile" then select "Manage Brokerage Account Information".

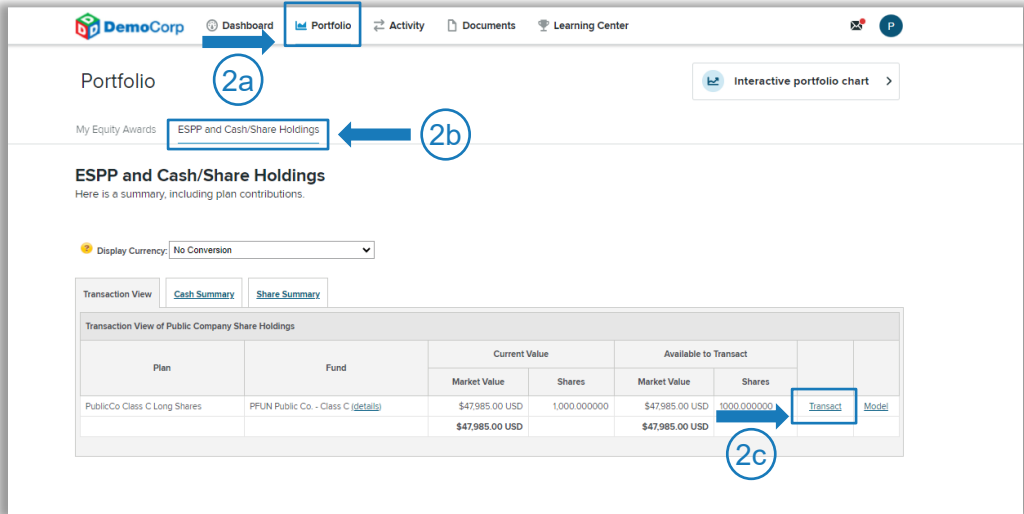


Click on the "Add Brokerage Account" button to add a new brokerage account or "Edit Brokerage Account" to make changes to an existing account.



2. Select Shares to Transfer

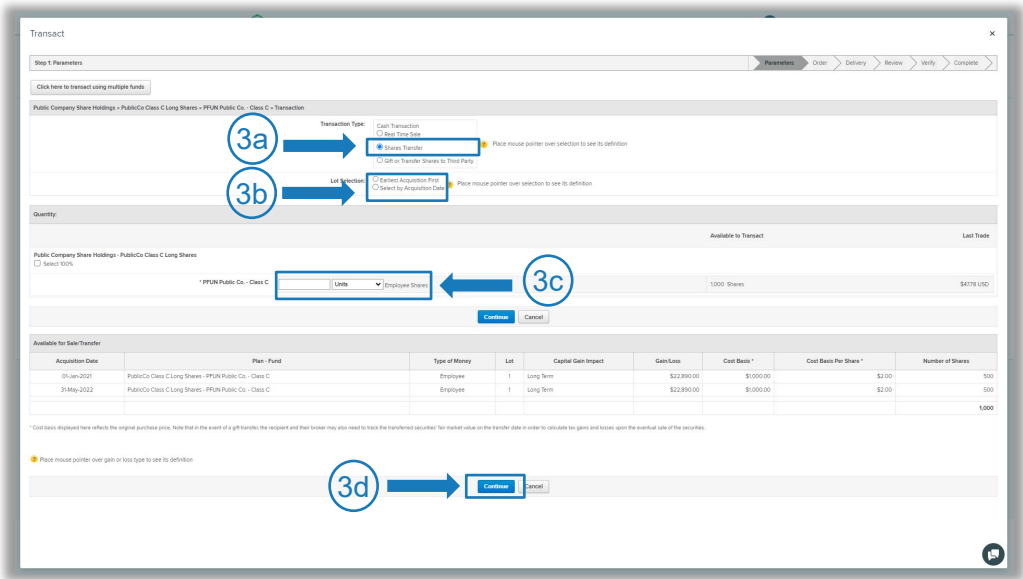
After adding your brokerage account go to "Portfolio" and select the "Cash/Share Holdings" tab. Click on "Transact" next to the shares you would like to transfer.



3. Setup Transaction Details

To transfer shares out, select “**Shares Transfer**” then make a lot selection and select the quantity of shares you would like to transfer. Click “**Continue**”.

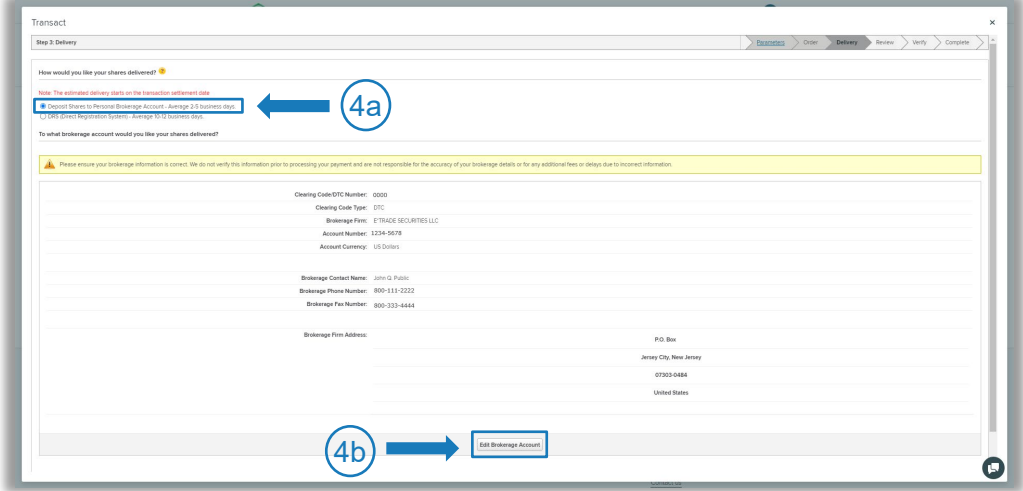
**TIP:** Hover over transaction types and lot selections for definitions of each option.



4. Setup Delivery Details

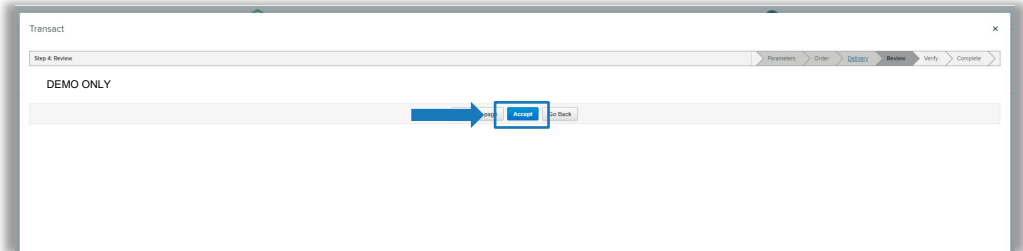
Choose how you would like your shares delivered. For “**Deposit Shares to Personal Brokerage Account**”, you will see your saved brokerage details populate. Click “**Continue**”.

**NOTE:** You can also edit Brokerage Account details on this page.



5. Review and Accept Details

Review the details of your transaction then click “**Accept**”.



6. Verify and Submit Transaction

Verify all information is correct then check the Terms and Conditions box. Click “Submit Transaction”.

Transact

Clearing Code Type: DTCC  
Clearing Code: 0000  
Clearing Code Memo:  
Account Number: 1234-5678  
Account Currency: USD  
Address: P.O. Box  
Jersey City, NJ 07310-0404  
United States

Employee Address  
Employee Address: 1 Main St  
NYC, NY 10021  
United States

Self Transfer by Lot

Acquisition Date	Lot	Type of Money	Capital Gain Impact	Gain/Loss	Cost Basis *	Cost Basis Per Share *	Shares
01-Jan-2021	1	Employee	Long Term	\$438.50	\$200.00	\$2.00	100

\* Cost basis displayed here reflects the original purchase price. Note that in the event of a gift transfer, the recipient and their broker may also need to track the transferred securities' fair market value on the transfer date in order to calculate the gains and losses upon the eventual sale of the securities.

Fund Quote Information

Symbol	Closing Price	Quote Date
CNYS	\$47.41 USD	31-Jul-2023

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[View General Conditions for use of System](#)

By checking the box, I confirm that I have read and accept the On-Line Disclaimer and General Conditions for Use of System.

Submit Transaction

Cancel

7. Transaction Complete!

Once you've completed your transaction you can click on “Back to Main Transaction Page” to model or transact other shares.

Transact

Step 6: Complete

PreviousOrderDeliveryReviewVerifyComplete

Transaction Complete  
Your transaction instructions have been successfully reviewed. The sale order has been routed to the exchange for execution.  
You may [click the date of your transaction](#). The proceeds and/or shares will be issued to you, as per your instructions, after your order has filled. When your order fills on the exchange, you will also receive an email alert to check your Notification Board for information on your fill.

Reference Numbers  
PublicCo Class C Long Shares - PFUN Public Co - Class C WBS09HSC7 EE

Your shares from this transaction will arrive in approximately **2-5** business days from the transaction settlement date.  
Time estimates are provided for information purposes only and cannot be guaranteed. If you choose to receive by mail, the Shares will be sent via registered mail.

Back to Main Transactions Page

## Have Questions?

Visit the Morgan Stanley at Work Support Center

<https://www.morganstanley.com/content/msdotcom/en/atwork/support>

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