



How To Sell Shares in Your Morgan Stanley at Work Stock Plan Account

Overview

Morgan Stanley at Work has recently made improvements to the process of selling shares in your stock plan account. Follow the steps below to get started.

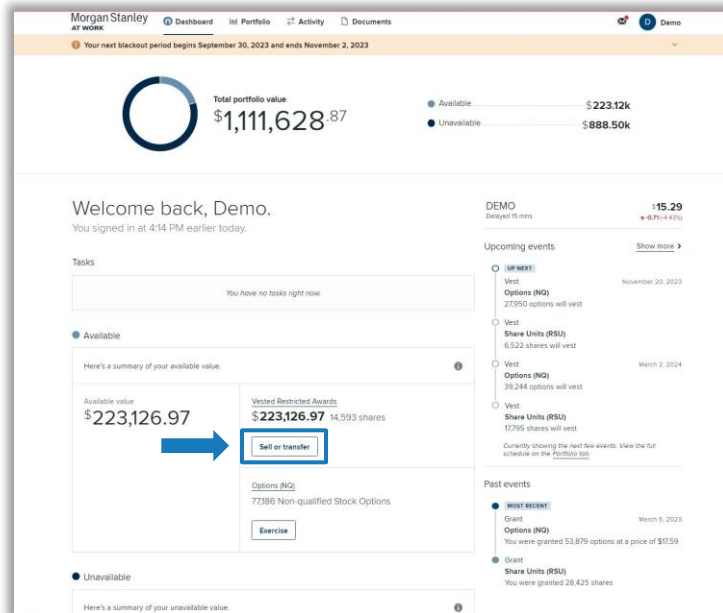
Please note, this view may not be available for all transaction types. If your transaction is not supported by the new view, you will be directed back to the classic view.

1. Login

Once you've logged in to your Morgan Stanley at Work stock plan account, you will be greeted with your **Dashboard**. [Click on the Sell or transfer](#) button under the **Available** section.

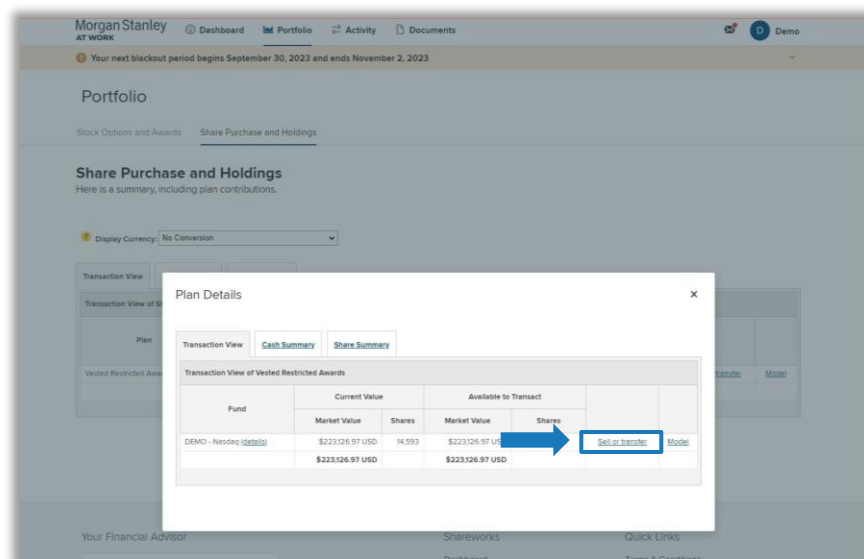
TIP: Available refers to any applicable equity types that can be transacted.

NOTE: Your company may have these buttons labeled differently.



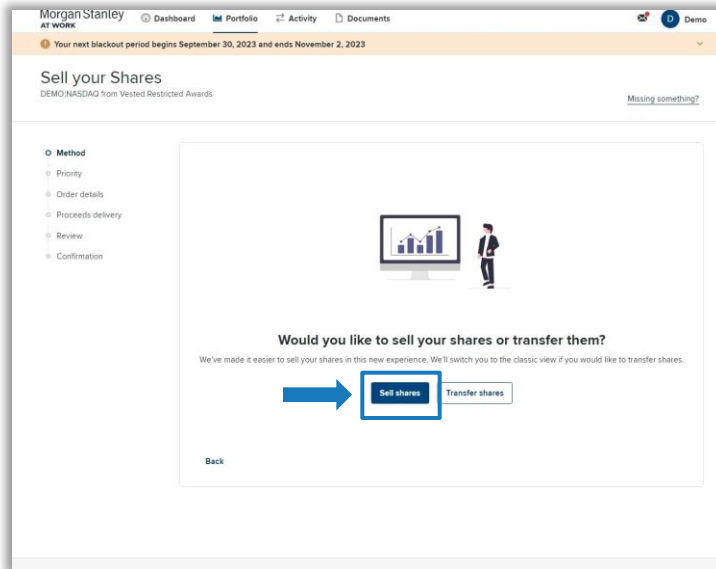
2. Plan Details

The pop-up window on the next page will show shares available to sell or transfer. [Click on the link](#) to move to the next step.



3. Method: Get Started

To start selling your shares, [click on Sell shares](#).

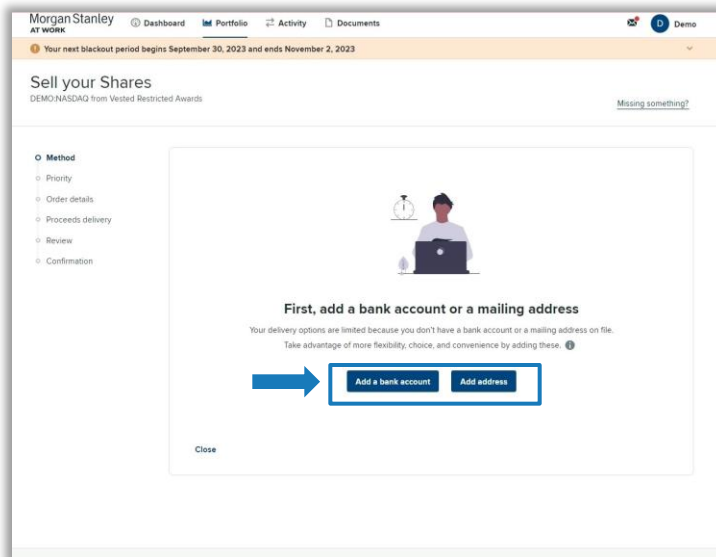


4. Method: Contact Information

Next, if you have not already done so, you will be asked to [add a bank account and/or mailing address](#).

This will be used to determine how you would like to receive your proceeds.

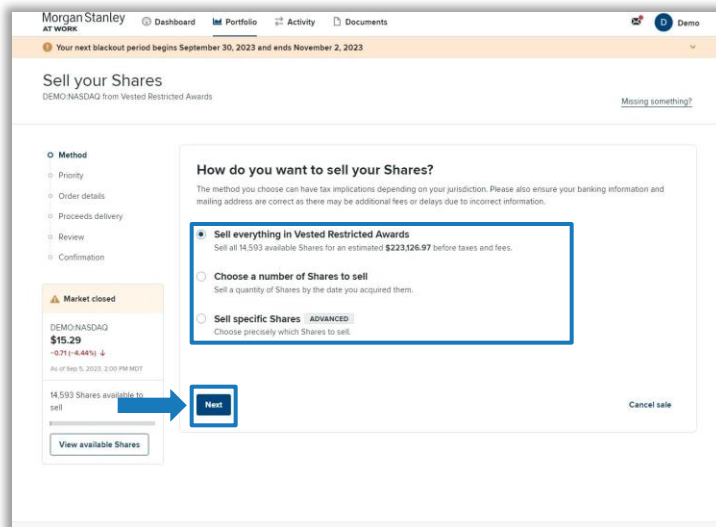
NOTE: If you already have a bank account and/or mailing address on file, this screen will not appear and you can continue to the next step.



5. Method: Sell Shares

On the following screen, you can determine [how you would like to sell your shares](#). Once you make your selection, [click Next](#).

NOTE: The exact screens will vary depending on which method you select.



6. Priority

Now choose **in what order** you would like to sell the shares you selected on the prior screen. **Click Next** to continue.

Morgan Stanley AT WORK

Dashboard Portfolio Activity Documents

Your next blackout period begins September 30, 2023 and ends November 2, 2023

Sell your Shares
DEMO NASDAQ from Vested Restricted Awards

Missing something?

- Method
- Priority
- Order details
- Proceeds delivery
- Review
- Confirmation

Market closed

DEMO NASDAQ
\$15.29
-0.71 (-4.44%)
As of Sep 5, 2023, 2:00 PM MDT

14,593 Shares available to sell

View available Shares

In what order do you want to sell?
Shares can be sold by the date you acquired them or by cost basis.

☒ Oldest first
Shares will be sold starting with the earliest acquired. This is known as First In, First Out (FIFO).

☐ Newest first
Shares will be sold starting with the most recently acquired. This is known as Last In, First Out (LIFO).

Next Back Cancel sale

7. Order Details

Once you have chosen the shares you'd like to sell, select at **what price and how many shares** you want to sell. **Click Next** to continue.

TIP: A **market order** allows you to sell your shares at the next available price on the market. A **limit order** allows you to set a certain target price you would like your stock to reach before selling.

Morgan Stanley AT WORK

Dashboard Portfolio Activity Documents

Your next blackout period begins September 30, 2023 and ends November 2, 2023

Sell your Shares
DEMO NASDAQ from Vested Restricted Awards

Missing something?

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14,593 Shares available to sell

View available Shares

Estimated net proceeds
\$0.00

How many Shares and at what price do you want to sell?
First, choose your price. Then, choose precisely which Shares to sell.

Sale kind

☒ Market order
Sell at the next available price on the market.

☐ Limit order
Sell when the stock reaches a target minimum price.

Market price
\$15.29

Shares available to sell

Shares you've held for more than 12 months

DATE ACQUIRED	COST BASIS PER SHARE	SHARES	PRIORITY TO SELL	WILL SELL	EST. GROSS PROCEEDS	GAIN OR LOSS
November 20, 2021	\$22.54	489	0	Sell all	--	--

Shares you've held for less than 12 months

DATE ACQUIRED	COST BASIS PER SHARE	SHARES	PRIORITY TO SELL	WILL SELL	EST. GROSS PROCEEDS	GAIN OR LOSS
November 20, 2022	\$6.02	4680	0	Sell all	--	--
March 2, 2023	\$17.41	5372	0	Sell all	--	--

Estimated net proceeds
\$0.00

Next Back Cancel sale

8. Proceeds Delivery

Next, select **how you would like to receive the money** from your sale. **Click Next** to continue.

NOTE: Timelines will vary based on the delivery method you choose.

Morgan Stanley AT WORK

Dashboard Portfolio Activity Documents

Your next blackout period begins September 30, 2023 and ends November 2, 2023

Sell your Shares
DEMO NASDAQ from Vested Restricted Awards

Missing something?

- Method
- Priority
- Order details
- Proceeds delivery
- Review
- Confirmation

Market closed

DEMO NASDAQ
\$15.29
-0.71 (-4.44%)
As of Sep 5, 2023, 2:00 PM MDT

Sell 4,700 of 14,593 Shares

View available Shares

Estimated net proceeds
\$71,998.37

How do you want to receive your money?
Choose where the funds of your sale are sent.

☒ Send to MORGAN STANLEY PRIVATE BANK NA (+4321)

☐ ACH (US accounts only)

☐ Send to CANADIAN IMPERIAL BANK OF COMMERCE (+6789)

☐ Wire to bank account

Send funds to mailing address

123 Demo Street
Anytown CA
92021 US

Which currency?
Choose what currency your funds will be sent in.

US dollars

There is no timeline estimate available for this delivery method.

Next Back Cancel sale

9. Review

Before placing your order, review all transaction information to verify it is correct. Once you have reviewed the information, [check the Terms & Conditions box](#) and [click Place in pending state](#) or [Send order to market](#) (if transacting during market hours).

NOTE: Depending on how your company is set up, you may not see a Terms & Conditions box to check.

Review
Check your order details before completing the sale.

Overview
Sell 4,710 Shares from Vested Restricted Awards

Market order details

Quantity	Market price	Sale kind
4,710 of your Shares	\$15.29	Market order Change kind

Breakdown

Quantity to be sold	4,710
Maximum of 14,593 Shares	
Market price	+ \$15.29
Gross proceeds (est.)	\$72,015.90
Supplemental Transaction	- \$0.58
Fee	- \$6.95
Brokerage Commission	- \$17,283.82
95% Federal Backup	- \$17,283.82
Withholding	
Net proceeds (est.)	\$54,724.55

Sale priority

The specific Shares you chose will be sold starting with earliest received.

DATE ACQUIRED	CAPITAL GAIN IMPACT	EST. GROSS PROCEEDS	COST BASIS PER SHARE	SHARES	GAIN OR LOSS
November 20, 2022	Short term	\$10,486.90	\$6.02	460	+\$42,734.70
March 2, 2023	Short term	\$1,529.00	\$17.41	100	-\$212.00

Proceeds delivery

Proceeds currency	Delivery method	Account
us US Dollar	ACH (US accounts only)	MORGAN STANLEY PRIVATE BANK NA

Before you complete your sale

Disclaimer: You are working outside market hours. Sales will be placed in a pending state until the market reopens.

By checking the box, you understand, acknowledge and agree that Morgan Stanley's broker-dealer subsidiaries, their clearing firms (as applicable) and their respective routing counterparties (collectively, the "Execution Venues"), in routing and/or executing any orders you submit to us through the Platform or in connection with the Services, may, in certain jurisdictions, treat such orders as "not held" and thus exercise both time and price discretion. You hereby authorize the Execution Venues to treat your orders as "not held" and exercise time and price discretion with respect to such orders.

☐ I have read and accept the Terms and Conditions

[Place in pending state](#) [Back](#) [Cancel sale](#)

9. Confirmation

Your order is complete! You can track your sale on the **Activity** tab.

Sell your shares
DEMO-NASDAQ from Vested Share Account

Missing something?

Your market order is in—we'll take it from here!
Track your sale on the Activity tab. When your sale is filled, we'll also notify you.

Reference number:
ABC12D3EF45-6GH

[Track your sale](#) [Go to Dashboard](#)

Need Help?

For assistance, please call the Morgan Stanley Service Center

For Canada, Mexico, United States:

(Toll-Free) **+1-866-533-2575**

Hours: 8 A.M. to 8 P.M. (Eastern Time)

All Other Countries (or if unable to connect):

Hours: 24 hours a day; Monday – Friday

Visit [AT&T Direct Toll-Free Access Codes website](#) and dial

The appropriate Access Code for your country, then **833-500-0341**.

Staffed languages:

French (during EMEA business hours), Cantonese, Japanese, Mandarin (during Asia Pacific business hours) plus translation available in 200+ languages through Language Line Solutions.

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