



Advance Notice of Gift of Securities (Stock)

DONOR INFORMATION

Name(s): _____ Date: _____

Email Address: _____ Phone Number: _____

SECURITIES DESCRIPTION

Company: _____ Stock Symbol: _____

Approximate Number of Shares: _____ Approximate Value: _____

Donor's Broker Name and Address: _____

Special Circumstances or Additional Relevant Information: _____

Gift Acceptance: Marist Catholic High School accepts securities, such as those traded on a stock exchange. In most cases, we make every effort to sell any gift of stock as soon as possible in order to preserve its current value. The value of a gift of stock is typically the mean between the high and low market value on the date the stock is transferred.

Delivery Instructions: Marist Catholic High School prefers that gifts of securities be transferred electronically into its account at Morgan Stanley, using the following information:

Account Name – Marist Catholic High School
Morgan Stanley DTC #0015
Account #149-117790
Marist Catholic High School Tax ID #93-1189917

Thank you for notifying Marist Catholic High School in advance of the delivery of your gift of securities. Please call Heather Boyles, Database Administrator at 541-686-2234 ext. 1805, or email at hboyles@marisths.org if you have any questions.