



## 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 Charles Schwab, using the following information:

Account Name – Marist Catholic High School  
Charles Schwab DTC #0164  
Account #4426-6756  
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](mailto:hboyles@marisths.org) if you have any questions.