TRANSFERRING STOCK TO SAINT FRANCIS HIGH SCHOOL

Giving to Saint Francis with stock ensures you maximize your impact through tax efficiency

Making a stock gift is a great, easy, and tax-smart way to invest in Saint Francis High School (SFHS). Gifts of appreciated securities can save you taxes more than once. You are generally able to deduct the full fair market value of appreciated long-term assets you have held for more than one year, such as stocks, bonds, or mutual funds. Appreciated assets can be among the most tax-advantaged items to contribute to charity because you can potentially eliminate capital gains tax liability on their sale and enjoy a current-year tax deduction.

If you currently have your shares of stock in your brokerage account, you will need to provide your broker with the following information:

Brokerage House: Morgan Stanley LLC
Broker Name: Tami Lautoa
Account Number: 814-023218-951
DTC Number: 0015
Saint Francis Tax ID: 94-1337628

Broker Address:
2725 Sand Hill Rd. #100
Menlo Park, CA 94025
Phone: 650.234.5933
Email: Tami.Lautoa@morganstanley.com

If you have a stock certificate in your possession and would like to donate gift restricted stocks or mutual funds, please contact SFHS Institutional Advancement:

Bernard Nemis
Institutional Advancement
Phone: 650.968.1213 ext. 272
Email: advancement@sfhs.com

Saint Francis
A HOLY CROSS HIGH SCHOOL

GIFT OF STOCK FORM

When making a gift of stock, please alert Saint Francis High School in advance so that your gift will be appropriately credited when received and we may provide an accurate and timely gift acknowledgment.

This form will assist Saint Francis High School process your gift of stock upon receiving it. When you have completed this form, please send it via email to the attention of Bernard Nemis at advancement@sfhs.com.

Date:

Donor Name:

Address:

Phone: Email:

Name of Stock:

Stock Symbol: Number of Shares:

Please choose:

○ SF Fund ○ Other (specify below)

Gift Details:

Stock Brokerage Firm:

Stockbroker's Name:

Phone: Email:

For any additional assistance, please contact Bernard Nemis at 650.968.1213 ext. 272.