



**Stock Donation Request**

Please complete the following information, which is necessary to process your stock donation. Please provide the following account information to your broker: account number B3S626589, and DTC number 0226. All stock transactions are processed through National Financial Services. If you have any questions, please feel free to call Gina Kerley in the Advancement Office at 512-244-4861 or email [gkerley@holyfamilycs.org](mailto:gkerley@holyfamilycs.org).

Donor Information:

Name: \_\_\_\_\_ Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Type of stock or mutual fund: \_\_\_\_\_

Broker/Dealer Name and Phone: \_\_\_\_\_

# of shares: \_\_\_\_\_ Approximate value of stock: \_\_\_\_\_

To be used for:     Choir of Angels Appeal     Endowment     Other \_\_\_\_\_

Date of Donation: \_\_\_\_\_

I am making the transfer:  
 Online     Through my broker     By stock certificate

Transfer instructions: \_\_\_\_\_

Please complete the following to enable our broker to transfer shares from your account.

If transferring from a shareholder account, fax a copy of your account statement and this form, to us at (512)244-4861.

Additional information: \_\_\_\_\_

\*\*Please continue only if stock is being transferred from a company transfer agent.

I/We authorize Holy Family Catholic School/North Central Catholic School Corp. to pull

# of shares: \_\_\_\_\_ Of (name of security): \_\_\_\_\_

From my/our account at: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(Required only for authorization of transfer; if joint account, both signatures required)

PLEASE RETURN THIS FORM TO THE ADVANCEMENT OFFICE VIA EMAIL OR BY MAIL USING THE ADDRESS BELOW.