



## Securities Donation Form

The Parish School accepts gifts of publicly traded securities. We cannot accept securities which are not publicly traded. Part 1 of this form contains information you or your broker will need to transfer security to the School's account. Please complete Parts 2 and 3 and return to The Parish School. If you have any questions regarding your gift, you may contact the Advancement office at [advancement@parishschool.org](mailto:advancement@parishschool.org) or (713) 467-4696. Thank you very much for your gift to The Parish School.

### PART 1: ELECTRONIC DELIVERY INFORMATION

You or your broker will use this information to transfer securities to The Parish School.

The Parish Children's School Brokerage Firm: Charles Schwab, Inc.  
The Parish Children's School Account Manager: Joseph Birkofer/Operations  
713-355-7171 / [jbirkofer@legacyasset.com](mailto:jbirkofer@legacyasset.com)  
Our Account Name: The Parish Children's School  
Our Account: 5883-7227  
Our DTC Number: 0164

### PART 2: DONOR INFORMATION

Please complete and return this form to the Advancement office at The Parish School (11001 Hammerly Blvd, Houston, TX 77043) or [advancement@parishschool.org](mailto:advancement@parishschool.org). This ensures that your gift is processed quickly and accurately and that your gift intentions are documented.

NOTE: Due to federal regulations, the school cannot sell gifted securities without the information below. Please do not rely on your broker to forward this information.

Donor's Name \_\_\_\_\_ Form Year \_\_\_\_\_ Parent:  Yes  No

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

### PART 3: SPECIFY THE FUND(S) FOR THIS GIFT

If you specify more than one fund, please give the amount for each, and where any balance should be applied.

Seeds for Growth Amount \$ \_\_\_\_\_

Financial Assistance Amount \$ \_\_\_\_\_

Other: \_\_\_\_\_ Amount \$ \_\_\_\_\_

### PART 4: SECURITIES INFORMATION

If you specify more than one fund, please give the amount for each, and where any balance should be applied.

Name \_\_\_\_\_ Symbol \_\_\_\_\_ # Shares or Approx. Value \_\_\_\_\_

Name \_\_\_\_\_ Symbol \_\_\_\_\_ # Shares or Approx. Value \_\_\_\_\_

Special Instructions \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_