De Marillac Academy Stock Donation Form

Investor Name: _______________________________________________________________

Daytime Phone: __________________ Fax: ___________________ E-mail ___________________

I/We hereby request that __________________________________________________________________________
(Investor’s Brokerage Firm)

transfer from our account number_______________________________________________________ the following:

Number of shares:  __________ Stock Symbol/Name: __________________________________________

Number of shares:  __________ Stock Symbol/Name: __________________________________________

Notes about Gift (optional):  _______________________________________________________________________

Please transfer the above item(s) to:

Brokerage Firm:  City National Securities
DTC Number:    0226
Account Name:   De Marillac Academy
Account Number:  BHS-300306

Investor’s Broker is to include the following information in the trailer line:

“For the Benefit of De Marillac Academy and Investor’s name”

City National Securities contact:
Regina Clark
(310) 888-6392
400 North Roxbury Drive, Seventh Floor
Beverly Hills, CA 90210

This transfer is a donation being made without expectation of products or services in return.

______________________________    ___________________
Investor/Donor Signature                     Date

Please email completed form to Jennifer Madar, Director of Finance:  jen_madar@demarillac.org

If you use a form provided by your broker, please notify the De Marillac Development Office upon transfer of stock.
Any questions may be directed to De Marillac Academy’s Development Office at (415) 552-5220.

*DO NOT transfer Mutual Funds using this form. If you wish to give mutual funds, please contact De Marillac Academy’s Development Office at (415) 552-5220.

Form updated: August 2018