



## 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've 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:	Dana Lenardon
For all gifts <u>except</u> to the Edge Fund:	814-023218-063
For transfers to the Edge Fund <u>only</u> :	814-023234-063
DTC Number:	0015
Saint Francis High School Tax ID:	94-1337628

Broker Address:  
2725 Sand Hill Rd. Ste. 100  
Menlo Park, CA 94025  
Phone: 650.234.5933  
Email: Dana.Lenardon@morganstanleypwm.com

If you have a stock certificate(s) in your possession or would like to gift restricted stock or a mutual fund, please contact SFHS Institutional Advancement:

Anna Quinones or Bernard Nemis  
Institutional Advancement  
Saint Francis High School  
1885 Miramonte Avenue  
Mountain View, California 94040  
Phone: 650.694.6372  
Fax: 650 968-1706  
Email: [advancement@sfhs.com](mailto:advancement@sfhs.com)



### Stock Gift Transmittal 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 is to help you in facilitating your gift of stock to Saint Francis High School. We do need the following information to assist in processing your stock gift. When you have completed this form, please send it via email to the attention of Anna Quinones or Bernard Nemis at [advancement@sfhs.com](mailto:advancement@sfhs.com). For any additional assistance, please contact Anna Quinones at 650.694.6372 or Bernard Nemis at 650.968.1213 ext. 272.

Date: \_\_\_\_\_

Donor Name(s) \_\_\_\_\_

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

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

Purpose of Gift: \_\_\_\_\_

Name of stock to be transferred: \_\_\_\_\_

Stock symbol: \_\_\_\_\_ Number of shares: \_\_\_\_\_

Saint Francis High School - #814-023218-063

SF Edge Fund **ONLY** - #814-023234-063

Stock brokerage firm: \_\_\_\_\_

Stockbroker's name /phone number: \_\_\_\_\_

Stockbroker's name / email: \_\_\_\_\_

Stocks to be transferred to SFHS through your broker to:

Saint Francis High School's brokerage account at Morgan Stanley LLC with Dana Lenardon

**DTC #015 | SAINT FRANCIS ACCOUNT #814-023218-063 | SF EDGE ACCOUNT #814-023234-063**