

# Head-Royce School Gift of Stock Form

Thank you for your interest in donating securities to Head-Royce School.  
Your gift is greatly appreciated.

**Please follow these instructions:**

- 1) Write a letter or FAX (510-531-2649) this form back to the School's Development Office with the following information:
  - Name of the Stock
  - Number of Shares
  - Date of transfer
  - Gift Designation
  
- 2) Transfer your stock to our account at Morgan Stanley:
  - Head-Royce Account #: 104-120765-056
  - For Electronic Transfer, our DTC # is: 0015
  - Head-Royce School Tax ID #: 94-151-8656

**Contact:** Mr. Mark Sanchez – MORGAN STANLEY  
1 Kaiser Plaza, Suite 900 • Oakland, CA 94612 • (510) 839-8080

- 3) For more information, call:  
Shoshana Ziblatt – Associate Director of Development – (510)531-1300 x 2148

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 **Yes! I would like to make a gift of stock to Head-Royce School.**

**DONOR INFORMATION**

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

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_ E-mail: \_\_\_\_\_

**STOCK INFORMATION**

Stock will be:  Sent to Head-Royce     Electronically Transferred

Name of stock: \_\_\_\_\_

Number of shares: \_\_\_\_\_ Date of transfer: \_\_\_\_\_

Name of broker: \_\_\_\_\_

Gift Designation:     HRS Annual Fund

Unrestricted             Restricted \_\_\_\_\_

Endowment

Unrestricted             Restricted \_\_\_\_\_

Other \_\_\_\_\_