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) Email or FAX (510-531-2649) this form back to the School’s Advancement 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:
   Ann Quan – Database Manager, 510-228-1501

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

DONOR INFORMATION
Name: ____________________________ Date: ________________
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
                       ☐ Endowment
                       ☐ HRS Annual Fund in support of: ___________________________

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