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) **Notify the Advancement Office of your stock gift:**
Send this form to us via email (advancement@headroyce.org) or fax (510) 531-2649.
Doing so ensures that we can record and allocate the gift appropriately.

2) Initiate the stock transfer with the following information:

- Name of receiving institution: Morgan Stanley
- DTC #: 0015
- Account Name/Owner: Head-Royce School
- Account number: 104-120765
- Head-Royce School tax identification number: 94-151-8656

Contact: Mark Sanchez – Morgan Stanley
1999 Harrison St. Suite 2200, Oakland, CA 94612, (510) 839-8080

3) For more information, please contact Alicia Boulware – *Director of Leadership Giving*, at (510) 228-1504 or aboulware@headroyce.org.

DONOR INFORMATION
indicates required information

*Name:_____

Address:_____

City:_____ State:_____ Zip:_____

Phone #:_____ E-mail:_____

☐ My gift is anonymous.

STOCK INFORMATION

*Name of stock:_____

*Number of shares:_____ *Date of transfer:_____

Name of broker:_____

*My gift is in support of:

HRS Annual Fund (choose one):

☐ Area of greatest need
☐ Anti-Racism Action Plan
☐ Professional Development
☐ Student Scholarships

☐ Other: _____