



# ST. IGNATIUS COLLEGE PREPARATORY TRANSFER OF SECURITIES

Thank you for considering a gift of stock to SI. Gifts of stock are a great way to give as you will not pay any capital gains taxes on any appreciated securities that you transfer directly to St. Ignatius.

On behalf of our students, the ultimate beneficiaries of all gifts received, thank you for your generosity and support of Jesuit education.

## 1. BEFORE MAKING THE TRANSFER:

Please notify our Advancement Services office at [advancement@siprep.org](mailto:advancement@siprep.org). Since your name will not accompany the electronic transfer of shares, we need the following information in order to issue the proper receipt for your tax-deductible donation and correctly credit your gift:

1. Name and Contact Information
2. Name of the Stock or Security
3. Number of Shares
4. Where would you like the gift directed: Ex: Immediate Need, Fr. Sauer Academy, Tuition Assistance, New Learning Commons

## 2. INSTRUCT YOUR BROKER:

To transfer your securities or stock to one of the firms that SI works with:

### **THE PIDGEON GROUP OF WELLS FARGO ADVISORS/DTC #0141**

**Account #6791-9271**

Ignatian Corporation

Attn: Robert Hamill

(800) 634-4965 • FAX: (415) 291-8657

### **CHARLES SCHWAB/DTC#0164**

**Account #SF 8767-6070**

Ignatian Corporation

FAX: (415) 636-6332

For internal gift crediting purposes, SI calculates the value of stock gifts based on the mean of the high and the low value per share on the date received into SI's brokerage account.

**ST. IGNATIUS COLLEGE PREPARATORY**

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