



EPISCOPAL  
HIGH SCHOOL

## Donor Letter of Transfer

Episcopal High School (EHS) provides this form letter to assist the donor in instructing his/her broker to transfer securities as a donation to the School. To assure that the donor receives proper credit for his/her gift, ***donor will please provide*** EHS with a copy of this letter by mail or email, including the name and telephone number of donor's broker.

Mail copy to: Debbie Kelley  
Stewardship Coordinator  
Episcopal High School 4650  
Bissonnet Bellaire, TX  
77401-3002

Email copy to: Debbie Kelley  
dkelley@ehshouston.org  
Telephone: 713-512-3442

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

To: Contact Name \_\_\_\_\_

Brokerage House \_\_\_\_\_

Broker Telephone Number \_\_\_\_\_ Broker Email \_\_\_\_\_

Address \_\_\_\_\_

City, State, and Zip Code \_\_\_\_\_

Re: Account Number: \_\_\_\_\_

Securities: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Estimated value at \$ \_\_\_\_\_

Please accept this letter as your authorization to deliver the securities from my account, referenced above, to the account of Episcopal High School, per the following instructions:

UBS Financial Services  
DTC #0221  
Further Credit Name: Episcopal High School  
Further Credit Account Number: UG 28065  
Contact name: Jim Matthews  
Email: jim.matthews@ubs.com  
Telephone Number: 713.985.3408  
Fax Number: 855.705.1321

Grantor Signature \_\_\_\_\_

Address \_\_\_\_\_ Tel \_\_\_\_\_ Email \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_