

PROCEDURE FOR TRANSFERRING A CHARITABLE GIFT

Thank you for considering a gift of stock to St. Thomas Academy. Please see below for the most current instructions on transferring such funds to STA.

Please call the STA Advancement Office (651) 683-1577 and inform us of your gift including the specific security, the number of shares, the name, address and telephone number of your broker, and any special instructions or designation for the use of your gift by the Academy.

Stock/Bond Transfer Instructions

If the securities you intend to give to St. Thomas are publicly traded and are held in "street name" by a brokerage firm, the institution prefers that the securities be transferred electronically from your personal account at your brokerage firm to the St. Thomas Academy account at UBS Financial Services, Inc. (UBS).

Instructions

UBS Financial Services, Inc.
Attn: Evans "Chip" Connelly
8500 Normandale Lake Blvd, Suite 210
Bloomington, MN 55437

UBS DTC: 0221

Account title: Saint Thomas Academy

Account number: 7N40894

STA Federal Tax ID: 41-6045110

Please include donor name.

For questions, you may reach out to UBS Financial Services:

- Geri Paquette at (952) 921-7932 or geri.a.paquette@ubs.com
- Evans "Chip" Connelly, Jr. at (651) 229-6070 or evans.connelly@ubs.com
- Evans "Mick" Connelly IV at (651) 229-6071 or evans.connellyiv@ubs.com

You may also fax inquiries to 877-540-1003 and a team member will respond to your request and inquiry.

If you or your broker have any questions, please contact the STA Advancement Office at (651) 683-1577.

Physical Delivery

If for some reason the securities are unable to be transferred electronically, and you need to make a physical delivery, please contact the advancement office to determine the delivery process best suited to your particular situation, (651) 683-1577.