



# The McGillis School

*Inspiring and preparing our community for a lifetime of creating a better world.*

## The McGillis School – Donation of Securities Information

Thank you for your gift of securities to the McGillis School.

### Our broker contact information is:

UBS Private Wealth Management

Joe Brienza  
Managing Director  
Tel. 303-481-1477  
Joe.brienza@ubs.com

Jessie Deck  
Team Administrator  
Tel. 303-481-1482  
Jessie.deck@ubs.com

Payton Dougherty  
Reg Client Service Assoc  
Tel. 303-481-1490  
payton.dougherty@ubs.com

### Transfer details:

UBS DTC number: 0221  
Account Name: The McGillis School  
Account Number: 3Q14835

The McGillis School Tax ID: 75-3048375

### Please provide the following information for processing of your gift and acknowledgement:

Donor Name: \_\_\_\_\_

Donor Address: \_\_\_\_\_

Donor Broker Name: \_\_\_\_\_

Donor Broker Firm: \_\_\_\_\_

Donor Broker Contact: \_\_\_\_\_

Name & Type of Security: \_\_\_\_\_

# of shares: \_\_\_\_\_

Date of Transfer \_\_\_\_\_

Purpose of Gift: \_\_\_\_\_