

ST. MARY'S EPISCOPAL SCHOOL

ELECTRONIC STOCK TRANSFER INSTRUCTIONS

To give by electronic stock transfer to St. Mary's, the shares should be transferred directly to St. Mary's brokerage account at UBS Financial Services, Inc. To initiate your gift, you will need to contact your broker to request the transfer and provide the following information:

Legal Name: St. Mary's Episcopal School

Tax ID Number: 62-0604637

Receiving Brokerage: UBS Financial Services, Inc.
DTC: 0221
Account Number: MN04032 St. Mary's

Brokerage Contact: Elliot Kierksy
Email: elliott.kiersky@ubs.com
Phone: 901-415-3039; 800-232-7954

Please notify Carrie Vaughan at St. Mary's of the upcoming stock. Please provide the correct donor name, name of the stock, number of shares, and the designation of the gift (i.e. for area of greatest need, financial aid, capital, endowment, etc.) to ensure that we accurately process and credit the gift for tax purposes.

St. Mary's Contact: Carrie Vaughan, Director of Philanthropy
Email: cvaughan@stmarysschool.org
901-537-1424