

# Head-Royce School

## Gift of Stock Form

Thank you for your interest in donating securities to Head-Royce School.  
Your gift is greatly appreciated.

### Please follow these instructions:

1) **Notify the Advancement Office of your stock gift:**  
Send this form to us via email ([advancement@headroyce.org](mailto:advancement@headroyce.org)) or fax (510) 531-2649.  
Doing so ensures that we can record and allocate the gift appropriately.

2) **Initiate the stock transfer with the following information:**

- Name of receiving institution: Morgan Stanley
- DTC #: 0015
- Account Name/Owner: Head-Royce School
- Account number: 104-120765
- Head-Royce School tax identification number: 94-151-8656

Contact: Mark Sanchez – Morgan Stanley  
1999 Harrison St. Suite 2200, Oakland, CA 94612, [\(510\) 839-8080](tel:(510)839-8080)

3) For more information, please contact Alicia Boulware – *Director of Leadership Giving*, at [\(510\) 228-1504](tel:(510)228-1504) or [aboulware@headroyce.org](mailto:aboulware@headroyce.org).

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### DONOR INFORMATION

*\*indicates required information*

\*Name: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_ E-mail: \_\_\_\_\_

My gift is anonymous.

### STOCK INFORMATION

\*Name of stock: \_\_\_\_\_

\*Number of shares: \_\_\_\_\_ \*Date of transfer: \_\_\_\_\_

Name of broker: \_\_\_\_\_

\*My gift is in support of:

HRS Annual Fund (choose one):

- Area of greatest need
- Anti-Racism Action Plan
- Professional Development
- Student Scholarships

Other: \_\_\_\_\_