

Transferring a Gift of Appreciated Securities

- When transferring a gift of appreciated securities to Duchesne Academy, please send through the School's account at Vanguard Institutional Advisory Services.
- Please direct the sending institution to send the shares to the school's Vanguard brokerage account:
 - Vanguard DTC #0062
 - Brokerage Account name: Duchesne Academy of the Sacred Heart
 - Brokerage account 44002580
 - Indicate Donor Name, Cost Basis Information
- Prior to receipt by Vanguard, please send Duchesne a confirmation of your stock gift that indicates the campaign you are supporting and the name(s) of the appreciated securities and the number of shares to be transferred.
- The value of the stock is determined by taking the average of the high and the low on the date of receipt into the Vanguard account.
- The securities will be sold no later than the next business day following the date of receipt.
- If you should have any questions about this transaction, please call Darlene Henson at 713-465-9825 or Beth Waguespack at 713-468-8211.

Thank you for your gift to Duchesne!