



## Gifts of Stock to St. Paul's Episcopal School

**ST. PAUL'S**  
EPISCOPAL SCHOOL

Thank you very much for your intent to make a gift to St. Paul's Episcopal School from your Investments. Our gift acceptance policy guides us to sell all such gifts promptly, in order to invest the proceeds in the appropriate account (operating and/or capital).

Please notify us of any such transfer of assets in terms of the name(s) of the investments and the number of shares, and let us know how you wish the gift to be designated (Annual Fund, Endowment, etc.).

Thank you again for your generosity. For further questions or assistance, please contact Melissa Hillier at 510-285-9630 or [mhillier@spes.org](mailto:mhillier@spes.org).

### Instructions to transfer stock to St. Paul's brokerage account:

**Note: Donor's broker must initiate transfer**

**1. JPMorgan Chase**

**Attn: Marci Rosenfeld**

**2100 El Camino Real**

**Palo Alto, CA 94306**

**Email: [marci.rosenfeld@jpmorgan.com](mailto:marci.rosenfeld@jpmorgan.com)**

**Phone: 650-289-1371**

**2. DTC #0352 – J.P. Morgan Securities LLC**

**3. St Paul's account number: 52030211**

**4. Account name: ST. PAUL'S DAY SCHOOL OF OAKLAND**

5. Please include the school and donor name on the trailer line (second line) of their transfer instruction



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Authorization to Transfer Assets of Securities: Please give this form to your broker or financial advisor.

**DTC #0352 – J.P. Morgan Securities LLC**

Account name: ST. PAUL'S DAY SCHOOL OF OAKLAND

Account number: **52030211**

Stock Name \_\_\_\_\_

Stock Symbol \_\_\_\_\_

Quantity \_\_\_\_\_

Estimated Value \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_