The Harvey School
Stock Transfer Form
Instructions Sheet

Please send the information requested in Part I (via mail/email/fax) to:
Sarah Parker
Director of Advancement
The Harvey School
260 Jay Street, Katonah, NY 10536
Fax: (914) 767-9106
Phone: (914) 232-3161, ext.111
sparker@harveyschool.org

Part I: Donor Information
Donor's name:
# of shares:
Type of stock:
Date of Transfer:
Broker's Name:
Brokerage Firm:
Broker's Phone: Broker's Fax:

Send the information in Part II to your broker for the actual transfer of the stock: ***Part II: Harvey School Stock Transfer Information***
The Harvey School Custodian: Pershing LLC
One Pershing Plaza,
Jersey City, New Jersey 07399

Account Name: Harvey School

Contact: Charlie Hayden Email: charlie@familymanage.com
Phone: (212) 872-9607
Fax 212-758-4020

DTC #: 0443

Account #: 3WJ-033875

Current as of November 2025