

Head-Royce School

scholarship · diversity · citizenship

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) 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:5108398080)
- 3) For more information, please contact:**
Alicia Boulware, *Director of Leadership Giving*, at [\(510\) 228-1504](tel:5102281504) or aboulware@headroyce.org

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: _____