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gillispie.org | info@gillispie.org

Stock Transfer Form

Thank you for your interest in donating stock to Gillispie School! To process your request, please follow the steps below.

Step One:

Please contact your broker to communicate stock transfer instructions, or obtain a charitable gift transfer form from your online trading account. You will need to communicate the Name of Stock, Ticker Symbol and Number of Shares to be donated to Gillispie School and provide Gillispie's brokerage account information as follows:

Name of receiving institution: LPL Financial, 4707 Executive Dr., San Diego, CA 92121

DTC #: 0075

Account #: 27248714

Account name: Gillispie School

Step Two:

Please fill out the following form and email to Jill McIntyre Kelly in the Advancement Office at jkelly@gillispie.org.

Name of Donor:

Donor Address:

Name and Ticker Symbol of Stock:

Number of Shares:

Donor's Stockbroker:

Donor's Account Number:

Date:

Signature:

Thank you so much for your donation! If you have any questions about the process, please contact Jill McIntyre Kelly, Director of Advancement & Community Relations, at 858-459-3773 x133 or jkelly@gillispie.org.