## **DE MARILLAC ACADEMY** Learning for Life • Transforming Lives

## Instructions for Gifts of Securities

Thank you for supporting De Marillac foundation with a gift of stock or other securities. It is important that you let us know about your gift, as securities gifts come through to our account without donor information attached. Completing and returning this form allows us to ensure that you are properly credited and acknowledged for your gift.

## 1) Provide your broker with the following information:

Brokerage Firm: City National Securities DTC Number: 0226 Account Name: De Marillac Academy Account Number: BHS-300306 Investor's Broker is to include the following information in the trailer line: "For the Benefit of De Marillac Academy and Investor's name"

Mutual funds can be sent via ACAT or TFER.

City National Securities contact: Regina Clark (310) 888-6392 400 North Roxbury Drive, Seventh Floor Beverly Hills, CA 90210

## 2) Please complete the following information:

Name:	
Address:	
Phone number:	
Name of security:	
Number of Shares:	
Date of gift:	
Estimated value of gift:	

3) Please email this completed form to Jennifer Madar, Director of Finance jen\_madar@demarillac.org