



ST. IGNATIUS COLLEGE PREPARATORY TRANSFER OF SECURITIES

Thank you for considering a gift of stock to SI. Gifts of stock are a great way to give as you will not pay any capital gains taxes on any appreciated securities that you transfer directly to St. Ignatius.

On behalf of our students, the ultimate beneficiaries of all gifts received, thank you for your generosity and support of Jesuit education.

1. BEFORE MAKING THE TRANSFER:

Please notify our Advancement Services office at advancement@siprep.org. Since your name will not accompany the electronic transfer of shares, we need the following information in order to issue the proper receipt for your tax-deductible donation and correctly credit your gift:

1. Name and Contact Information
2. Name of the Stock or Security
3. Number of Shares
4. Which SI brokerage account you are sending it through.
5. Where would you like the gift directed: Ex: Immediate Need, Fr. Sauer Academy, Tuition Assistance, New Learning Commons

2. INSTRUCT YOUR BROKER:

To transfer your securities or stock to one of the firms that SI works with:

OPPENHEIMER & CO. INC./DTC#0571

Account #G70 142 7309

Account Name: Ignatian Corporation

Attn: Mitch Hickey

(415) 438-3044 • mitchell.hickey@opco.com

THE PIDGEON GROUP OF WELLS FARGO ADVISORS/DTC #0141

Account #6791-9271

Account Name: Ignatian Corporation

Attn: Robert Hamill

(800) 634-4965 • Fax: (415) 291-8657

For internal gift crediting purposes, SI calculates the value of stock gifts based on the mean of the high and the low value per share on the date received into SI's brokerage account.

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Ignatian Corporation • Tax ID #: 94-1451515