



Campbell Hall

EPISCOPAL

GIFTS OF STOCK FORM

Thank you for choosing to make your gift to Campbell Hall via securities. Please fill in the information requested below and email the completed form to:

- ✓ Campbell Hall Advancement Office - anderss@campbellhall.org
- ✓ UBS Financial Services - lise.ly@ubs.com
- ✓ Give the original form to your broker and keep a copy for your files

Your Name: _____

Broker's Name: _____

Brokerage: _____

You are hereby authorized to transfer the following stocks:

Name of Company: _____

of Shares: _____ now held in the account: _____

Account #: _____

Please transfer the stock as of: _____

Date

TO: UBS Financial Services
FBO: Campbell Hall Episcopal School
Account # Y6-88114
DTC #0221

I/we do hereby certify that the above transfer constitutes a gift to Campbell Hall and I/we relinquish all further interest in this instrument.

Signature and printed name _____
Date

Signature and printed name _____
Date

Please note: **Once the transfer has been completed, the stock will be sold immediately. You may be required to file IRS form 8283 for gifts of stock. Please check with your tax advisor.*

For questions, or problems with delivery, please contact:

Lise Ly,
lise.ly@ubs.com
 Senior Registered Client Service Associate
 UBS Financial Services, Inc.
 Office 310-734-2476 | 888-843-6991
 FAX (US only) 855-208-6171