



Gift of Stock Authorization Form

Thank you for your generous plans to gift securities to Francis Parker School. Once you have decided on the securities you will transfer to Parker, please complete this form and return it to Parker so we can prepare an acknowledgment for your tax purposes. The instructions below should be provided to your broker for the electronic transfer of securities. Please allow for sufficient processing time by your broker, particularly at year-end (at least two weeks may be required). **The value assigned to your gift is the average of the high and low value of the stock on the date the gift is received by the brokerage firm.**

We also accept Mutual Funds; please contact the Advancement Office directly.

Information your brokerage firm needs:

Brokerage Firm:	City National Securities 555 S. Flower St., 11 th Floor Los Angeles, CA 90071
DTC Number	#0226
Account Name	Francis Parker School (Activity)
Account Number	#BHS304547
Clearing Firm	National Financial Services, LLC. (NFS, LLC.)
Send to the Attention of	Colin Beamish at Colin.Beamish@cnb.com
Phone Number	858 / 356 - 3236
Parker's Tax ID	95-1696720

Information Parker needs:

Donor Name:
Address:
City/State/Zip:
Daytime Phone:
Email Address:

I have instructed my brokerage firm to transfer to Francis Parker School

_____ (# of shares/amount) of _____ (name of stock) to be designated for the following purpose (choose one):

- General Endowment
- Financial Assistance Endowment
- Faculty Endowment
- Program Endowment
- Head of School Scholarship
- Parker Forward – Phase 8
- Current-use Fund-a-Scholarship (Gala)
- Current-use Professional Development and Salaries (Day of Giving)
- Other (please list): _____

Brokerage Firm _____

Broker's Name _____ Phone _____

Signed _____

Please send the completed Stock Authorization Form to:

Attn: Shara Freeman Hoefel, Assistant Head of School for External Relations, Francis Parker School, 6501 Linda Vista Road, San Diego, CA 92111; Phone: 858/ 569-7900 ext. 4106; Email: advancement@francisparker.org