



# THE ROXBURY LATIN SCHOOL

101 St. Theresa Avenue | West Roxbury, Massachusetts 02132

## Stock Donation Gift Form

# 1

Please supply the following information to your broker, who will need it to transfer stock to the school's account:

DTC#: 0997 State Street Bank & Trust Co.  
FFC: A/C #RXLD The Roxbury Latin School  
Ref.: The Roxbury Latin School  
Tax ID#: 04-2104857

Contact information for State Street Corporation:

State Street Corporation  
Attn: Chris T. Vokolek  
801 Pennsylvania Avenue  
Kansas City, MO 64105  
Tel: 816-871-8628  
E-mail: [ctvokolek@statestreet.com](mailto:ctvokolek@statestreet.com)

# 2

Contact **Julie Garvey in the Roxbury Latin Development Office** (contact information below) and provide the following information:

Donor's name \_\_\_\_\_ RL class year (if applicable) \_\_\_\_\_

Donor's address \_\_\_\_\_

How the funds should be directed (annual fund, endowment fund, tribute, etc.)  
\_\_\_\_\_

Is this a pledge payment?  Yes  No

Stock name \_\_\_\_\_ Stock symbol \_\_\_\_\_

Number of shares and approximate value \_\_\_\_\_

Delivering brokerage firm name \_\_\_\_\_

Brokerage firm contact person \_\_\_\_\_

Contact phone number \_\_\_\_\_

Any special instructions \_\_\_\_\_

**To contact Julie Garvey:**

Tel: 617-477-6370 E-mail: [julie.garvey@roxburylatin.org](mailto:julie.garvey@roxburylatin.org) Fax: 617-325-3585