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 number: 0997 (State Street Bank and Trust Company)
Account number: RXLD
Reference: The Roxbury Latin School
Tax ID number: 04-2104857
Donor name: ________________________________

Contact information for State Street Corporation:
State Street Corporation
Attn: Jared Douglas
801 Pennsylvania Avenue
Kansas City, MO 64105
Tel: 816-871-8628
E-mail: JCDouglas@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    Fax: 617-325-3585

THE ROXBURY LATIN SCHOOL
101 St. Theresa Avenue  |  West Roxbury, Massachusetts 02132

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