



## 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 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: Tammie L. Henry

1100 Main Street, Suite 400

Kansas City, MO 64105

Tel: 816-871-7249

E-mail: [tlhenry@statestreet.com](mailto:tlhenry@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