



AMY DE GUIA

Development Coordinator | Office of Development | 253-761-3520

## Gifts of Stock

**We are grateful for your consideration of supporting Bellarmine with a gift of stock. In order to clarify the procedure for creating or paying a gift to Bellarmine with stock we have outlined the necessary steps to take:**

1. Contact your brokerage firm and sign an authorization for transfer of stock to Bellarmine's Merrill Lynch account.

Merrill Lynch Contact: Lisa Rohr

253-597-8310

Account name: Bellarmine Preparatory School, Tacoma, WA 98405 (EIN# 91-1109930)

Brokerage account #: 32504055

DTC: #5198

2. Please notify Katey Ward, Annual Giving Manager, Development Office at Bellarmine (253-761-3522 or [wardk@bellarmineprep.org](mailto:wardk@bellarmineprep.org)) of your intention and provide the following information so we can effectively track the stock transaction:

- Name of your brokerage firm.
- Type of stock and number of shares transferred.
- Purpose for gift of stock (i.e. payment or gift to Capital Campaign, Annual Giving, Endowment, etc.)

Merrill Lynch will contact Bellarmine after notification on transfer of shares. The charitable value of your gift is determined by the average of the high and low stock price on the date of transfer.

Thanks for your support to Bellarmine and if you have any additional questions please contact Katey Ward at Bellarmine (253-761-3522 or [wardk@bellarmineprep.org](mailto:wardk@bellarmineprep.org)) or Dean M. Hanks, VP for Development (253-879-9875 or [hanksd@bellarmineprep.org](mailto:hanksd@bellarmineprep.org)).