



# UNIVERSITY OF DETROIT JESUIT

## HIGH SCHOOL AND ACADEMY

### Gifts of Securities

**BROKER DELIVERY INSTRUCTIONS:**

(DTC eligible securities only, for all other types of securities please call Jeff Yost or Jennifer Smiljanich at SJS-Investment Consulting, Inc., phone 419-885-2626)

**Charles Schwab & Co., Inc.**

**DTC# 0164**

**ACCOUNT NUMBER: 5905-1721**

**ACCOUNT NAME: University of Detroit Jesuit High School and Academy**

Please call Jeff Yost or Jennifer Smiljanich at SJS-Investment, Inc., phone 419-885-2626, if you have any questions about the gifting process.

MEMO TO: Jeff Yost or Jennifer Smiljanich at SJS Investment Consulting, Inc.  
PHONE: 419-885-2626  
FAX: 419-885-2236  
RE: GIFTS OF SECURITIES

THE FOLLOWING INDIVIDUAL(S) WILL BE MAKING A GIFT OF SECURITIES TO:

*University of Detroit Jesuit High School and Academy*  
Tax ID # 38-1360587

\*DONOR:

NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
PHONE: \_\_\_\_\_

NAME OF SECURITY: \_\_\_\_\_

QUANTITY: \_\_\_\_\_ # OF SHARES

DELIVERING BROKER: \_\_\_\_\_

BROKER CONTACT:

NAME: \_\_\_\_\_  
PHONE: \_\_\_\_\_

Either the individual named above or their broker will be contacting you to coordinate the transfer of the securities.

PLEASE NOTE ANY RESTRICTIONS ON GIFTS BELOW:

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\*It is very helpful if the donor notifies U of D Jesuit High School & Academy (8400 South Cambridge, Detroit Michigan 48221) directly of your intention to make a donation. We often receive checks from the broker with no donor information attached. In order to properly credit each donation we need the donor contact information. Please contact David Gumbel '00 at 313.927.2347 or email David at David.Gumbel@uofdjesuit.org.