



UNIVERSITY OF DETROIT JESUIT

HIGH SCHOOL AND ACADEMY

Gift 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 Services, phone 419-885-2626, if you have any questions about the gifting process.

MEMO TO: Jeff Yost or Jennifer Smiljanich at SJS Investment Services
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:

*It is very helpful if the donor notifies U of D Jesuit High School & Academy (8400 South Cambridge, Detroit, MI 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 Dave Gumbel '00 at 313-927-2347 or email Dave at David.Gumbel@uofdjesuit.org.

The Jesuit Experience. More than an Education.