

St. Simon Parish

1860 Grant Road, Los Altos, Ca. 94024
650-967-8311 Fax: 650-967-8876

Gift of Stock Instructions

This information should be used when making a gift of stock to St. Simon Church or St. Simon School.

Broker: UBS Financial Services Inc.
64 Willow Place
Menlo Park, Ca. 94025-3601

Financial Advisor: Sara Saxe
(800) 544-6611
(650) 289-7088

Account Number: **KP 58952 17**
DTC 0221 (electronic stock transfer number)

Diocesan Taxpayer ID 94-2734503

Please notify the St. Simon Parish Business Office of your transaction by completing this form and returning it to: St. Simon Church, 1860 Grant Road, Los Altos, Ca. 945024. Attention: Business Manager. Or please fax to: 650-967-8876, or call 650-967-8311 ext 16.

Donor Name _____

Address _____

Phone Number _____ Email _____

Name of stock to be transferred _____

Number of Shares _____

Date of Transaction _____