

## Holy Names Academy Donations of Stock

**Notification** – Please notify the HNA Planned Giving Office with the details (e.g., stock name, number of shares) so that we know to expect the transfer. Contact Cara Priestley at 206-720-7803 or [cpriestley@holynames-sea.org](mailto:cpriestley@holynames-sea.org).

**If held by a broker** – Shares can be transferred electronically to the Holy Names Academy account at Ameritrade via the Depository Trust System (DTC). The instructions should read, “Transfer to Ameritrade, DTC #0188, for Holy Names Academy account #780-940968.” Your broker will require authorization from you, in writing, to make the transfer. Most will accept a fax or email.

**If held in certificate form in your name:** Do not fill in or sign the back of the stock certificate. Deliver the certificate to Cara Priestley (Planned Giving Office) or Francis Olson (Finance Office) at Holy Names Academy. The certificate must be accompanied by two documents, both signed by all those named on the face of the certificate.

Document # 1: A **Stock Power**. This form is available at all brokerage offices, at many banks and from the HNA Development Office. Do not fill in any blanks on this form - just signatures as follows. This form must be signed by all those named on the face of the stock certificate, in front of a bank or brokerage employee who is authorized to apply a Medallion Signature Guarantee stamp and signature. No other form of signature guarantee is acceptable.

Document # 2: An **Ameritrade Third Party Release Form**. This form is available from HNA. This form must be completed and then signed by all those named on the face of the stock certificate, in front of a bank or brokerage person who is authorized to apply a Medallion Signature Guarantee stamp and signature. No other form of signature guarantee is acceptable.

If personal delivery to HNA is not convenient, you can mail the certificate and paperwork, in separate envelopes, to the address below. Keep a photocopy of the certificate for your records and use certified mail. Please include a cover letter or note.

**If the certificate is in the name of Holy Names Academy:** Please avoid having certificates registered in the name of Holy Names Academy if at all possible. The required paperwork is cumbersome and the sale can be held up for weeks pending clearance by the transfer agent. If this cannot be avoided, please deliver the certificate to the Development Office.

*Holy Names Academy  
Attn: Planned Giving Office  
728 21<sup>st</sup> Avenue East  
Seattle, WA 98112-4058*