



ROOSEVELT FOR GENERATIONS CAPITAL CAMPAIGN
Theodore Roosevelt High School Foundation
Transfer Information for Gifts of Stock or Other Assets

(Donor's Name)

(Account Number)

(Name of Company)

(Stockbroker Name & Contact #)

STEP 1: INFORMATION FROM DONOR TO BROKER

Please transfer immediately _____ (#) shares of _____ (name of stock) from the above account to the Roosevelt High School Foundation Fund. The gift of stock, mutual funds* or bonds should be transferred to:

Theodore Roosevelt High School Foundation
Fed. Tax ID #42-1239735
Account # 73U-193833
Pershing DTC #0443

*If a BIN and/or fund account number is needed for a transfer of mutual funds, please contact Securities America 402-399-9111.

STEP 2: INFORMATION TO TRHS Foundation

Chris Diebel
515-612-6599
TRHSFoundationdm@gmail.com

Provide the Foundation with:

- The name of the donor who is making the gift
- The Company sending the gift
- The stock name, mutual fund or bonds and the number of shares

(Donor Signature)

(Date)

This documentation is to be completed by the donor and then scanned and emailed to the following:

- The TRHS Foundation at trhsfoundationdm@gmail.com
- Donor's broker