

# 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.  
775 Page Mill Road  
Palo Alto CA 94304-1002

Financial Advisor: James Millette  
(800) 523-5868  
(650) 496-7400

Account Number: **OA 58952 A8**  
**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

Donor Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone Number \_\_\_\_\_ Email \_\_\_\_\_

Name of stock to be transferred \_\_\_\_\_

Number of Shares \_\_\_\_\_

Date of Transaction \_\_\_\_\_