

# 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 Parish 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 \_\_\_\_\_