

# SAINT BEDE ABBEY AND ACADEMY

24 West US Highway 6  
Peru, Illinois 61354

phone (815) 223-3140  
www.st-bede.com

## Gift of Securities Notification Form

To notify Saint Bede of a gift of securities, please contact us with complete donor information (name, address, phone number), the name and type of securities to be gifted, the number of shares, and the date you intend to make the gift.

### **DTC Transfer of Stock**

Name and Address of Donor: \_\_\_\_\_

Security Description: \_\_\_\_\_

Date of Transfer: \_\_\_\_\_ Number of Shares: \_\_\_\_\_ Approximate value: \$ \_\_\_\_\_

In order to promptly and accurately credit a security gift to the appropriate donor, it is essential that the transfer instructions include the donor's name and address. Without this information it is difficult to identify the donors of certain securities and the gift designation.

When you provide your broker these instructions to transfer the funds, please also have him/her contact us and confirm the name of the stock and the number of shares being transferred. **The bank does not receive information about who is requesting the transfer, so we want to make sure your gift is credited to you. It is extremely important that the donor's name is noted on the transaction/check so we can properly acknowledge your gift for your records and tax purposes.**

**Deliver Shares to DTC broker #0075, Saint Bede Account#: 6954-7172  
LPL Financial Services, Our federal tax-exempt number is 36-218-2109  
LPL Financial Advisor Contact: Steve Witek (815) 223-3332**

In accordance with your instructions, once received the securities will be sold and specific proceeds you direct will be applied to (circle) **St. Bede Annual Fund** **Legacy Project** **Auction** **Other** \_\_\_\_\_

Please confirm the transfer of the above by signing below and return this form by email to: [jyaklich@st-bede.com](mailto:jyaklich@st-bede.com); or fax 815-223-8580 or mail to Saint Bede, 24 W US Hwy 6, Peru, IL 61354

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

**Thank you for your support of Saint Bede.**

If you or your broker has any questions about transferring stock, please contact: Julia Yaklich, Director of Mission Advancement & Major Gifts at (815) 250-0359 or [jyaklich@st-bede.com](mailto:jyaklich@st-bede.com)