



Stock Gift Instruction Information

There are three ways to make a gift of stock to Bellarmine College Preparatory:

- 1. Electronic Transfer** (From your Brokerage Account into BCP's Brokerage Account).
 - a)** Donor prepares a letter addressed to Bellarmine, stating their intentions of transferring a gift of stock. Please indicate the number of shares, name of stock and where you wish for your gift to be directed, once received.
 - b)** Donor either faxes, mails or e-mails a copy of this gift letter to the person listed at the bottom of these instructions. ***This step is critical to assure that you will receive credit for the complete value of your stock, on said date of transfer.**
 - c)** Fax, mail or e-mail your brokerage account manager, instructing him/her to make a direct electronic transfer from your account into Bellarmine's brokerage account - to the attention of:

Mr. Frank Bisceglia - Vice President
UBS Financial Services, Inc.
50 W. San Fernando Street, Suite 820
San Jose, CA 95113
(408) 286-5500

UBS DTC NUMBER FOR ELECTRONIC TRANSFER: 0221

BELLARMINE'S ACCOUNT NUMBER AT UBS: SJ 40871 33

BELLARMINE'S TAX ID NUMBER: 94-1160938

- 2. Certificate prepared specifically in Bellarmine's name.**

Have your stock transfer agent complete a stock certificate directly to Bellarmine College Preparatory and forward to the person listed at the bottom of these instructions.
- 3. Stock certificate registered in Donor's name.**
 - a)** Donor prepares a gift letter addressed to Bellarmine stating that the stock certificate is a gift to Bellarmine. All legal owners named on the certificate must sign this letter.
 - b)** All legal owners must sign and date the release on the back of the certificate exactly as they are listed on the face of the certificate.
 - c)** Mail gift letter and certificate to the person listed at the bottom of these instructions.

Thank you for your cooperation. All correspondence and questions should be addressed to:

Pat Wahler
Bellarmino College Preparatory
960 West Hedding Street
San Jose, CA 95126
Phone: (408) 537-9219 Fax: (408) 294-1894 E-mail: pwahler@bcp.org