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:

Ben Roseberry
Bellarmine College Preparatory
960 West Hedding Street
San Jose, CA  95126
Phone: (408) 537-9263  Fax: (408) 294-1894  E-mail: broseberry@bcp.org

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