



Donor Letter of Transfer

Episcopal High School (EHS) provides this form letter to assist the donor in instructing his/her broker to transfer securities as a donation to the School. To assure that the donor receives proper credit for his/her gift, ***donor will please provide EHS with a copy of this letter by mail or email, including the name and telephone number of donor's broker.***

Mail copy to: Margaret Young
Director of Annual Giving & Major Gifts
Episcopal High School
4650 Bissonnet
Bellaire, TX 77401-3002

Email copy to: Margaret Young
myoung@ehshouston.org
Telephone: 713-512.3600

Date: _____

To: Contact Name _____
Brokerage House _____
Broker Telephone Number _____ Broker Email _____
Address _____
City, State, and Zip Code _____
Re: Account Number: _____
Securities: _____
Number of Shares: _____ Estimated value at \$ _____

Please accept this letter as your authorization to deliver the securities from my account, referenced above, to the account of Episcopal High School, per the following instructions:

UBS Financial Services
DTC #0221
Further Credit Name: Episcopal High School
Further Credit Account Number: UG 28065
Contact name: Jim Matthews
Email: jim.matthews@ubs.com
Telephone Number: 713.985.3408
Fax Number: 855.705.1321

Grantor Signature _____

Address _____ Tel _____ Email _____
City _____ State _____ Zip Code _____