**Procedure to donate publicly traded stock**

**to Mercy High School**

**(revised January 2018)**

Thank you for your gift of stock to Mercy High School in Omaha, Nebraska. Your gift will make a difference in the education of Mercy Girls. Please complete these three steps:

1. Complete & Sign the information below
2. Send this form to YOUR brokerage firm
3. Fax this document to Securities America via 402-399-5579  
   or email this document to Mindy Henningsen at [mindyhenningsen@americanwealthpartners.net](mailto:mindyhenningsen@americanwealthpartners.net)

If you have any questions, please contact Jim Pogge, Vice President for Advancement, at Mercy High School: 402.553.9424 ext. 102, or [poggej@mercyhigh.org](mailto:poggej@mercyhigh.org) If after hours, call Jim at 402.598.0985.

***Please complete this section:***

Donor Name(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Brokerage company name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Brokerage account number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of stock donated: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CUSIP: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of shares: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Read and Sign:**

I (We), the undersigned, wish to donate the above shares of publicly traded stock to Mercy High School in Omaha, Nebraska. I (We) will transfer this stock from our brokerage account to Mercy High School’s brokerage account at Securities America, Inc., and understand that these shares will be sold and the proceeds will be directly deposited in Mercy High School’s bank account at American National Bank. I (we) understand that Mercy High School will send to me (us) an acknowledgement of this gift and a receipt for my (our) tax purposes.

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**Donor Date Donor (if applicable) Date**

For **BROKERAGE Office** use:

Account registration at Securities America, Inc.: Mercy High School (CORP)

Account number at Securities America, Inc.: A5G338575

Receiving firm’s name: National Financial Services

DTC number for receiving firm: 0226

Address for receiving firm:

Securities America, Inc.  
 12325 Port Grace Blvd

La Vista, NE 68128