

**PROCEDURES FOR TRANSFERRING GIFTS
OF STOCK TO UNIVERSITY SCHOOL**

TO TRANSFER STOCK, CONTACT:

**Mr. Charles Marston through Client Service Associate Denise Dobay
UBS Financial Services Inc.**

600 Superior Avenue, East

27th Floor

Cleveland OH 44114

Direct Number for Denise Dobay (216) 736-2856

Toll Free # 1-800-533-6386

Fax 216-736-2836

denise.dobay@ubs.com

University School Tax ID # 34-0714720

Account # LD06039

DTC #0221

PLEASE NOTIFY TERESA BELL VIA E-MAIL TBELL@US.EDU OR FAX 216-831-0402

- 1) **name of the donor (Very Important)**
- 2) **date of the gift**
- 3) **stock name and/or symbol (Very Important)**
- 4) **number of shares**
- 5) **approximate amount of gift**
- 6) **NAME OF STOCK BROKER AND PHONE/EMAIL ADDRESS**
Very Important

For more information, please contact:

Teresa Bell

Advancement Office

University School

2785 SOM Center Rd.

Hunting Valley, OH 44022

216/831-1984 x7316

tbell@us.edu