



## GIVING SECURITIES/STOCK TO THE SAISD FOUNDATION

Thank you for considering a gift of securities/stock to The SAISD Foundation. To facilitate electronic transfer, receipt, and proper acknowledgement of your gift, please provide your broker these delivery instructions.

It is very important that you also complete the form below and e-mail, mail or otherwise deliver it to the SAISD Foundation. Stock is very often received by our broker without the donor's identity included, so completion of this simple form will help us identify your gift quickly. If you prefer, you can simply email the information about your gift to [saisdfoundation@saisd.net](mailto:saisdfoundation@saisd.net).

If the value of your securities/stock has declined since you purchased them, it may be to your advantage to sell them and give the cash proceeds instead. Please check with your professional wealth advisor for details.

### **Delivery Instructions**

DTC Number: 0226

Account Number: 037-290318

Account Name: SAISD FOUNDATION

Contact: Marco Rodriguez, Vice President | Wealth Advisor  
Frost Brokerage Services, Inc. | Frost Investment Services, Inc.  
Email: [marco.rodriguez@frostbank.com](mailto:marco.rodriguez@frostbank.com)  
Telephone: (210) 220-6542

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### **Gift Details:**

Judy Geelhoed, Executive Director  
2411 San Pedro  
San Antonio, Texas 78212  
Phone: (210) 554-2235      Email: [saisdfoundation@saisd.net](mailto:saisdfoundation@saisd.net)

Donor Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Broker Name: \_\_\_\_\_ Broker Phone #: \_\_\_\_\_

Broker Firm: \_\_\_\_\_

Name of Securities/Stock: \_\_\_\_\_ Ticker: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Expected date of transfer: \_\_\_\_\_