



## **STOCK TRANSFER**

1. Donor notifies the Development Office that a gift of stock is pending and specifies its designation (Capital Campaign, Annual Fund, General Fund, G.I.V.E., Endowment, etc.).
2. Donor forwards the following account information to his/her broker:
  - A. Account is with UBS FINANCIAL c/o Greg Naples @  
UBS Financial  
43 Village Way Suite #201  
Hudson, Ohio 44236  
330.655.8300
  - B. Name of Account: Seton Catholic School
  - C. Account #XD03723
  - D. Designate transfer for Seton Catholic School, Hudson, Ohio
  - E. DTC #0221
3. The values of the shares will be based on the closing price of the security on the day UBS receives the shares, with proceeds deposited in the Seton Catholic School account as specified by donor.

### **QUESTIONS?**

Please contact Mrs. Barbara Synek, Seton Accountant @ 330.342.4200, x 224.

